



NASSCOM®

**India's Tech Industry
in the US**

A Contribution Review

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भारत का राजदूत
वॉशिंगटन, डी. सी.

AMBASSADOR OF INDIA

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WASHINGTON, D.C. 20008

MESSAGE

The trade and economic engagement between India and the United States is on a high growth path and provides a key under-pinning to our bilateral Strategic Partnership. The value-based partnerships between the Indian industry, in particular the IT industry, and its US counterparts has been one of the defining features of our commercial relationship. The business links in the technology domain expand beyond trade in services to include strengthening of innovation in development of products and services, productivity increases in US businesses and much broader people-to-people engagement.

The Indian IT industry has played a significant role in shaping India's high growth trajectory. Its growing capabilities around transformative services, new business models, flexible product portfolios, verticalised solutions, and services around new technologies such as cloud, analytics, social media and enterprise mobility coupled with the industry's continued focus on operational efficiencies and non-linearity have resulted in Indian industry becoming an important partner to businesses in the US. I am confident that this engagement will continue to flourish and achieve greater heights.

NASSCOM's report is timely in focusing with clarity on the general and specific contributions that the Indian IT industry has made to the US economy, including through support of close to 280,000 jobs in the US; and contribution of nearly USD 15 billion in taxes. The report is comprehensive and research-based, and is another commendable effort that highlights the fact that Indian IT industry believes in building long-term partnerships with the United States, including through mutually beneficial value-based commercial ties expressed through job creation and integration with the local economy in the United States.

Nirupama Rao

March 2012

Foreword

The relationship between the United States and India is robust and vibrant. The level of cooperation and the exchange of goods, services, and ideas between the two countries continues to grow in both size and importance.

There are few, if any, large US or India-based firms that do not have operations or partners in each country. Similarly, virtually all the products and services related to high tech sector are now developed and deployed leveraging the talent in both countries. It is hard to identify a single mainstream Information Technology (IT) product, website, computer, cell phone, or other such item that did not owe its origin to the brainpower of both countries.

The evolving partnership has resulted in significant gains for the two countries. New businesses and entire industry segments have been born. Hundreds of thousands, if not millions, of new jobs have been created in and by the sector. Additionally, the lives of people of all ages have been enriched and their opportunities expanded as a result of the technologies and technological advancements that have been born out of this relationship.

The next phase of this partnership will see a continuation and vast expansion of the investments both nations are making in the other. The USTR office notes that the flow of investment between the US and India is increasingly important.

Indian firms are deeply committed to the US marketplace. Both they and their employees are important contributors in their local communities as well as the country as a whole. From offering business solutions to developing important technologies and from engaging in corporate philanthropy to supporting and participating in local schools, sports leagues, civic activities and more; these firms and their employees, and their thousands of partners are deeply ingrained in the country's everyday activities.

The following report is one of the first efforts to quantify the trends and benefits behind the significant investments India-based IT and BPO firms are making in the US. The sample used for the study was a fraction of the sector so one can only extrapolate the magnitude of the true relationship. A relationship that is certain to grow at a fast pace for years to come.

As a person with deep ties in both countries, it's been my extreme pleasure to watch all this happen and to look forward to seeing where it goes from here.

Som Mittal
President, NASSCOM

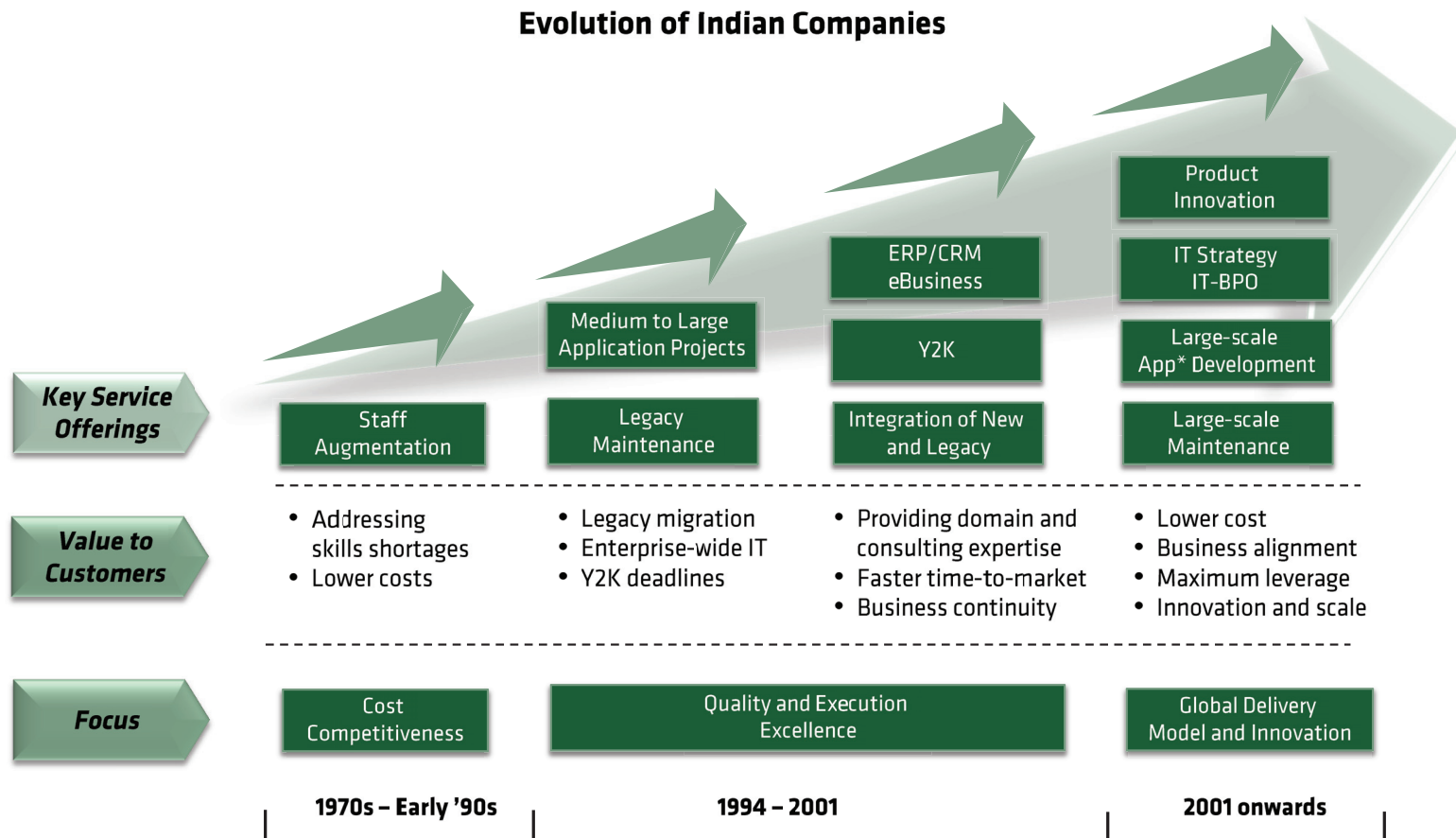
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Overview of India-US Relationship

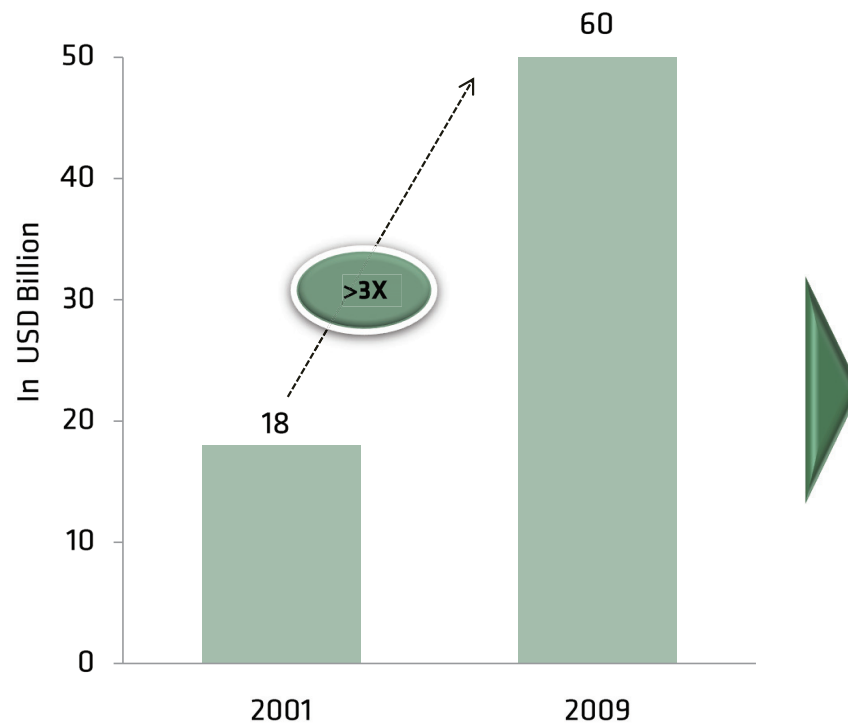
Indian tech industry has evolved from a legacy service-based solution provider to a partner in product/service innovations over the last four decades



Note: *App stands for application
Source: Press Releases; Company Websites; Zinnov Analysis

The volume of bilateral trade between the US and India has more than tripled between 2001 and 2009

Growth of Bilateral Trade* between India and the US (2001-09)



• India-US trade - A snapshot

- Bilateral trade in merchandise goods have grown by eight times in the last 20 years
- US exports to India has grown by 17 percent between 2009 and 2010
- 10 out of 15 tech companies in India are from the US

• Indian FDI in the US

- 90 percent growth in Indian FDI to the US between 2009 and 2010

Note: *Bilateral trade refers to exports and imports of services and merchandise goods
Source: Indian Embassy, US Department of Commerce; United States Trade Representative (USTR)

Industry has been the key contributor to the Indo-US bilateral trade

Factors driving Indo-US relation	Description
Innovation	<ul style="list-style-type: none">• Innovation in project delivery – Global Delivery Model<ul style="list-style-type: none">– The model involves an optimal mix of onsite, offshore and nearshore resources to meet the requirements of the client– In the model, a team from a tech company evaluates and consults the client requirements at the client location while another team in an offshore location executes the client requirements• Key benefits of the model<ul style="list-style-type: none">– Realtime/extended work day – Due to 12-hour time difference between India and the US, both the actions can take place in real-time– Support jobs in onsite locations – Due to the need for onsite presence, the Indian companies have been able to create jobs at onsite locations and support indirect jobs as well
Value Creation	<hr/> <ul style="list-style-type: none">• Value creation through productivity enhancement<ul style="list-style-type: none">– Indian companies have helped US clients reduce time-to-market for the new products and services– The companies have also directly supported several community development initiatives such as:<ul style="list-style-type: none">• Improving the skill capability of citizens through training programs• Developing employment opportunities for weaker section of the US society such as veterans and underprivileged students

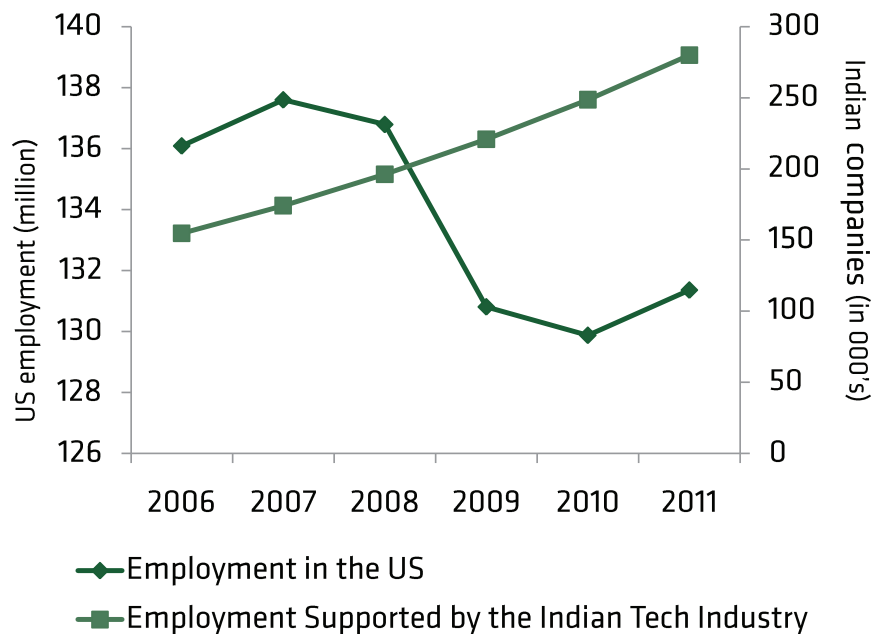
Source: Zinnov Analysis



Indian Tech Industry in the US

Steadily adding jobs in the US economy even while the economy on the whole has been shedding jobs

Total Employment in the US vs. Employment Supported by the Indian Tech Industry (FY2006 to FY2011)

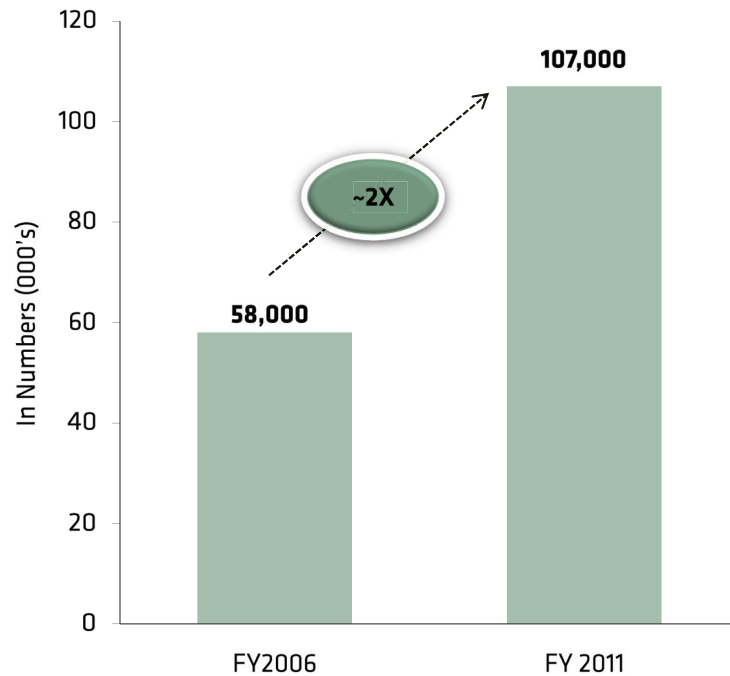


- The overall unemployment rate in the US is at 9 percent while for the tech sector, it is around 4 percent
- Contrary to the perception, maximum number of job losses were witnessed in construction, manufacturing and retail industry
- Unemployment rate for employees with Bachelor's degree or higher has not crossed 5 percent
- During the recession, Indian companies were able to add jobs and hire locals in the US instead of reducing headcount

Source: Bureau of Labor Statistics-Non-Farm Payroll Data; Zinnov Analysis

The direct workforce employed in the US has almost doubled in the last five years

Direct Employment Created (FY2006 to FY2011)*



Future Hiring Plans - Illustrative**



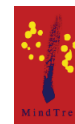
- Aegis plans to add more than 4,000 jobs in the US over the next two years



- Genpact is planning to increase its US workforce for multiple positions



- HCL plans to hire more than 1,000 local employees across the US over the next 18 months



- MindTree plans to increase the US workforce by 30 percent

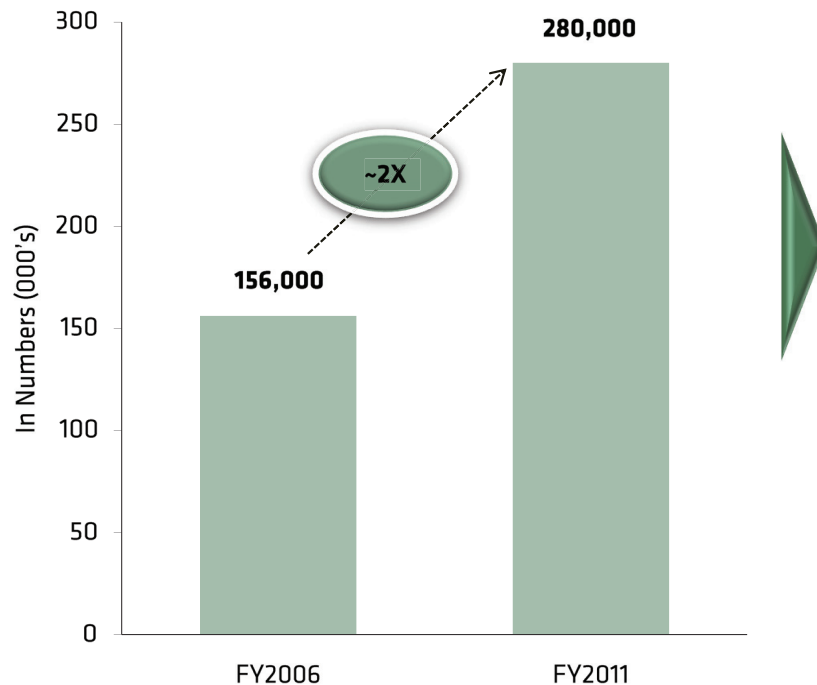


- TCS plans to hire more than 1,200 local employees in the US

Notes: *Direct employment includes employees working in client location and development centers
 ** Representative list of few Indian tech companies. It does not represent the hiring plans of the entire industry
 Source: NAASSCOM Member Survey; Press Releases; Literature Review; Zinnov Analysis

Supports more than 280,000 jobs in the US, growing even in a weak economic environment

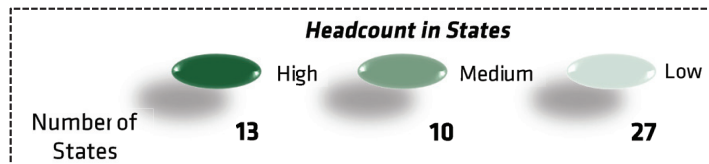
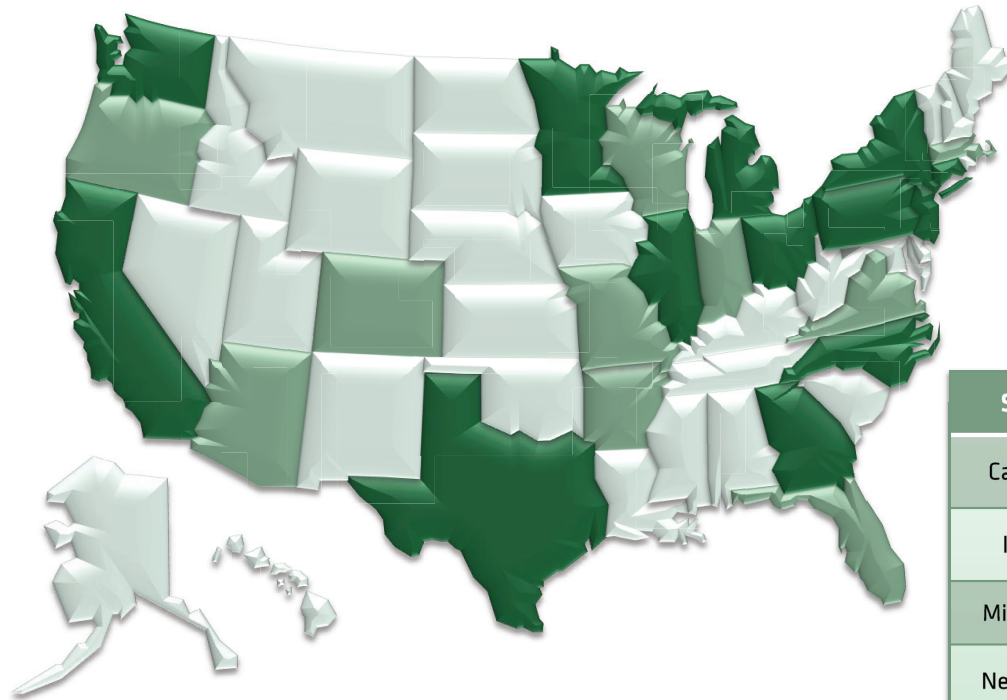
**Total Employment Supported
(FY2006 to FY2011)***



- Three out of every four jobs supported by Indian companies are constituted by locals in the US
- Based on updated employment multipliers of Economic Policy Institute (EPI), for every one direct job, approximately 1.6 indirect jobs have been supported in the ecosystem
- About 175,000 indirect jobs are supported in the ecosystem consisting of
 - Supplier industry refers to logistics, travel, courier, telecom, computer hardware
 - Re-spending industry refers to retail, utility, travel, hospitality, pharma, IT, etc.
 - Government sector refers to federal and state government jobs

Note: *Employment includes direct and indirect jobs
Source: NAASSCOM Member Survey; Press Releases; Zinnov Analysis

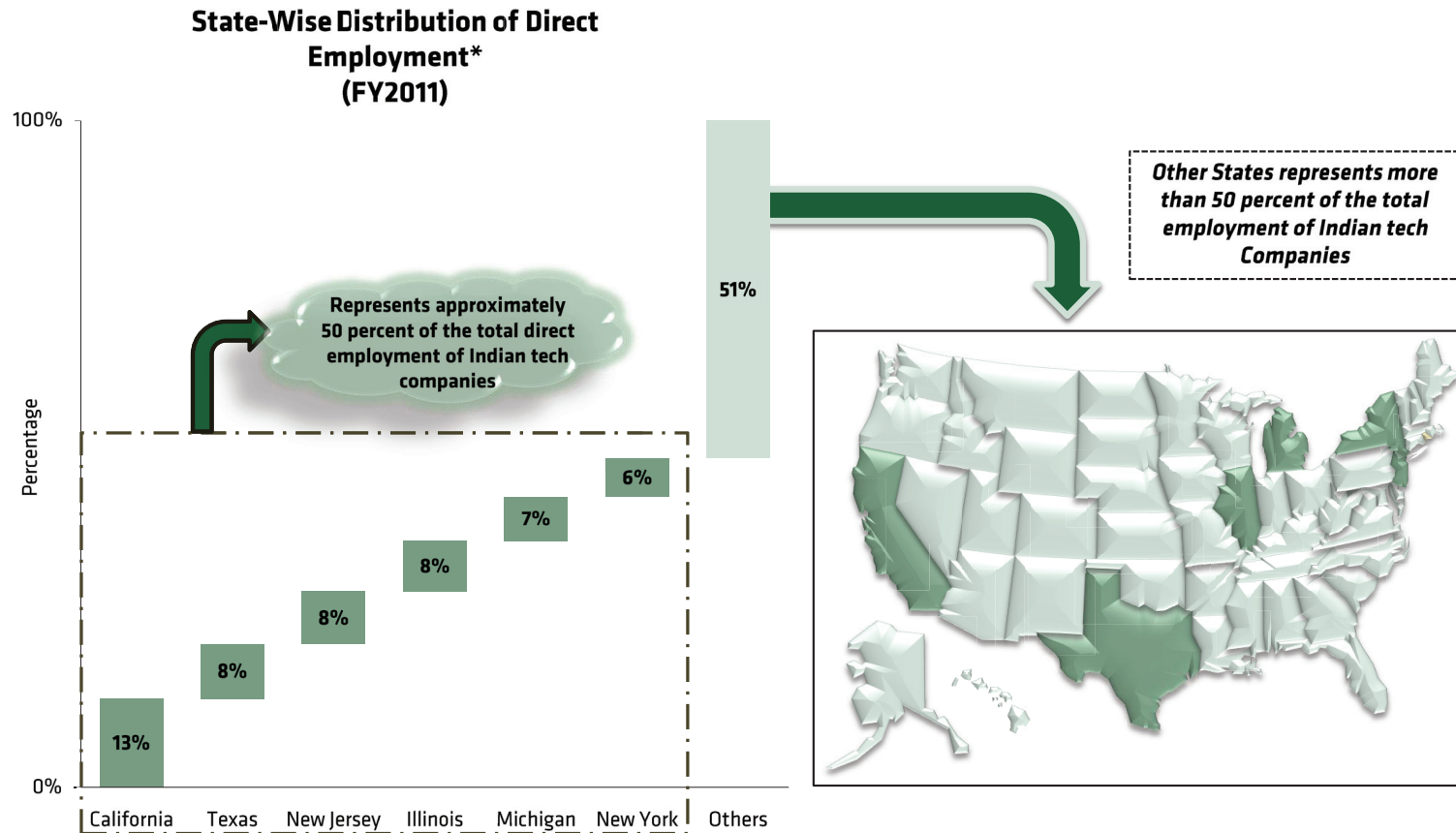
Increasing direct employment across all States in the US



States	Indian Tech Companies
California	Genpact, HCL, UST Global, Infosys, TCS, Wipro
Illinois	Genpact, Headstrong, HCL, Infosys, Infotech Enterprises, TCS, Wipro
Minnesota	Aditya Birla, HCL, Infosys, TCS, Wipro
New Jersey	HCL, Infosys, TCS, Wipro, Hexaware, EXL, Genpact
New York	HCL, Headstrong, Infosys, TCS, Wipro, EXL
Texas	Aditya Birla, EXL, HCL, Infosys, TCS, Wipro, UST Global
Washington	HCL, Infosys, Infotech Enterprises, Mastek, TCS

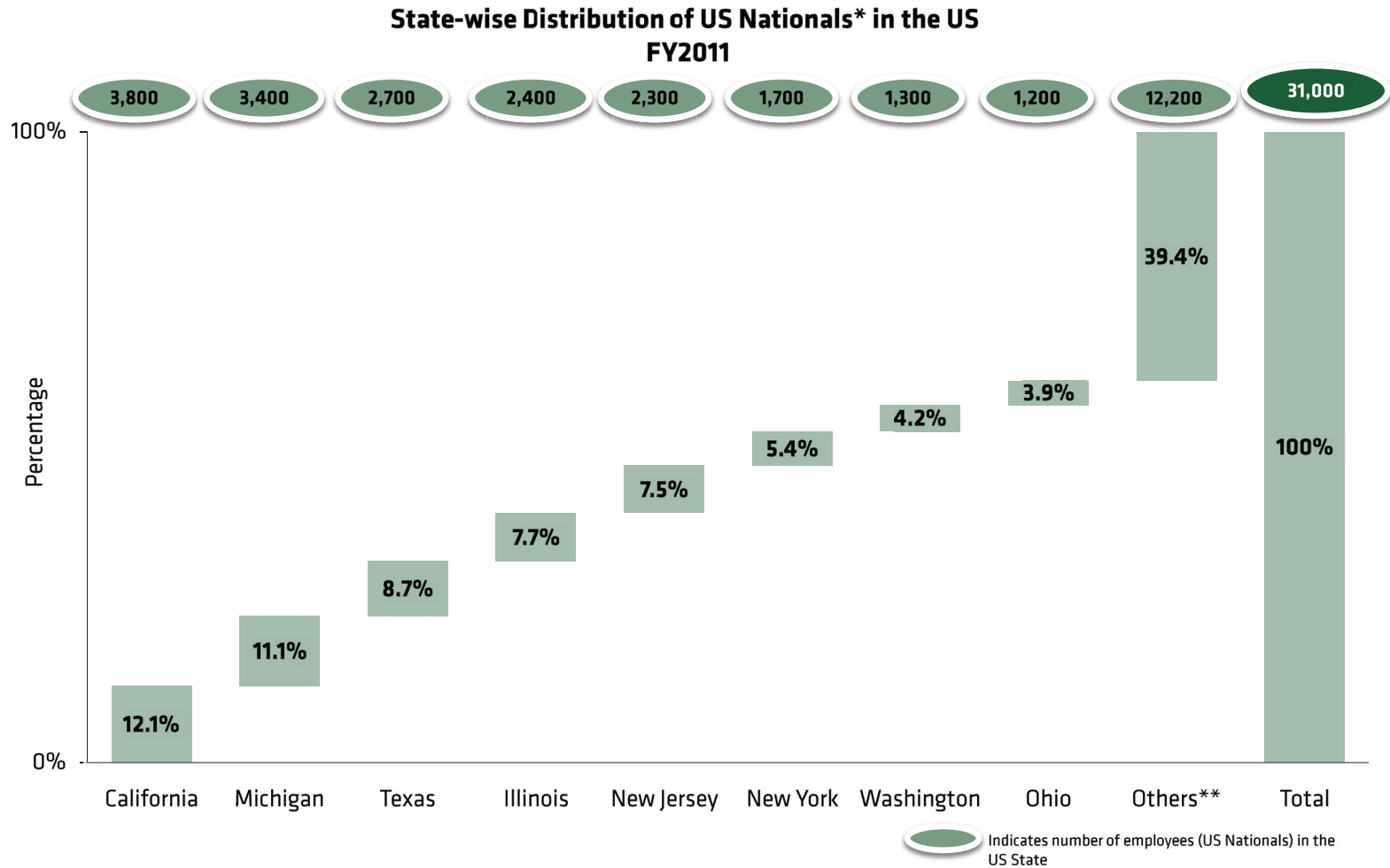
Note: *High refers to States with more than 3,500 jobs; Medium refers to States with jobs between 900 and 3,500; Emerging refers to States with less than 900 jobs
 Source: NAASSCOM Member Survey; Zinnov Analysis

California, Texas, New Jersey, Illinois, Michigan and New York account for 50 percent of the direct employment supported



Notes: Extrapolation on the basis of actual numbers shared by Indian tech companies
 *Direct employment includes employees working in client location and development centers
 Source: NASSCOM Member Survey; Zinnov Analysis

About 40 percent of total US nationals employed are working in California, Michigan, Texas and Illinois



Notes: Extrapolation on the basis of actual numbers shared by Indian tech companies; Talent includes employees working in both, client location and development centers

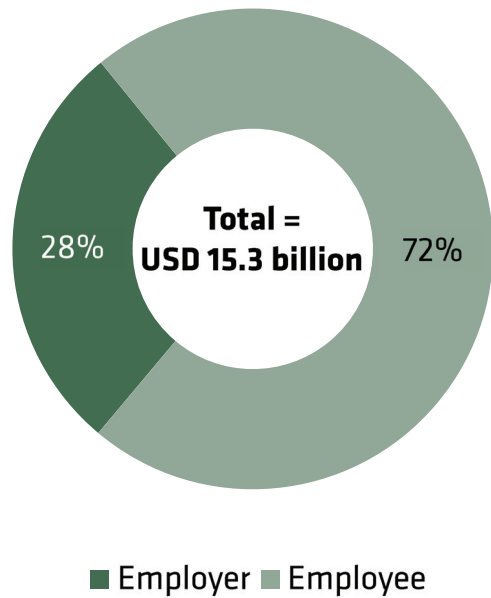
* US nationals include green card holders, US passport holders and US citizens by birth

**Others includes States such as Georgia, Minnesota, North Carolina, Pennsylvania, Connecticut, etc.

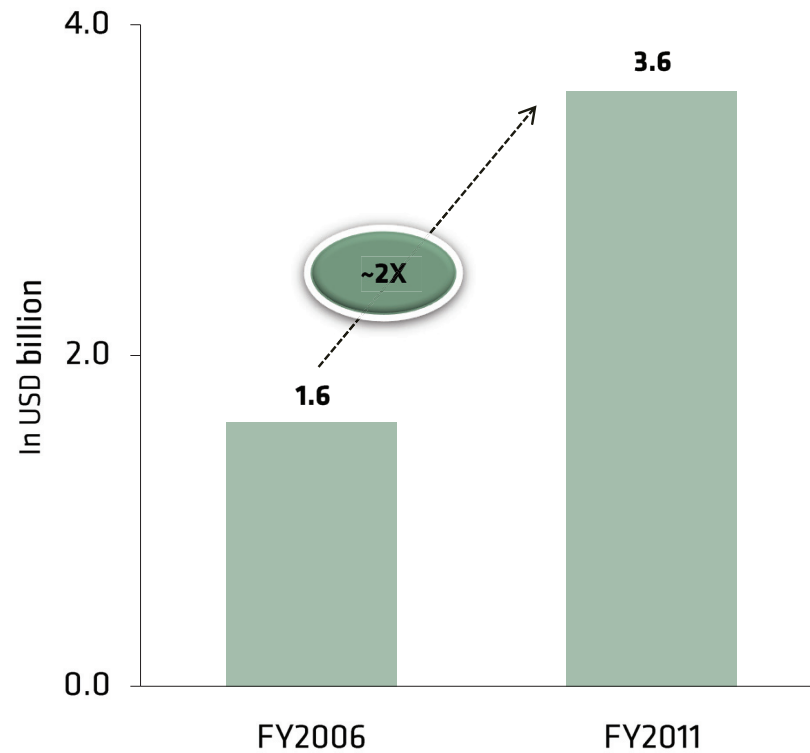
Source: NASSCOM Member Survey; Zinnov Analysis

Indian tech Industry has paid more than USD 15 billion in taxes to the US Treasury

Total Taxes Paid in the Last Five Years*



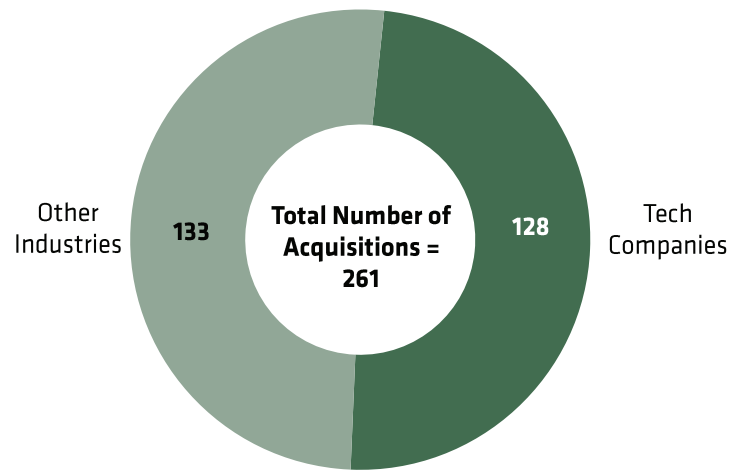
Growth of Tax Contribution (FY2006 to FY2011)*



Note: *This includes taxes paid by both, employer and employees of Indian tech companies in the US for the period between FY2006 and FY2011
Source: NASSCOM Member Survey; Press Releases, Zinnov Analysis

Direct investment of more than USD 5 billion helped save US jobs and support future growth

Distribution of Acquisitions in the US by Indian Companies (FY2007 to FY2011-Q1)



- Indian tech companies have invested more than USD 5 billion* through 128 acquisitions in the US
- Growth in acquisitions by the Indian companies in the US increased to 54 percent in FY2010 from 41 percent in FY2009
- These investments have saved thousands of jobs in the US

Note: *Total investments = Average size of declared deals multiplied by number of acquisitions
Source: FICCI; Zinnov Analysis

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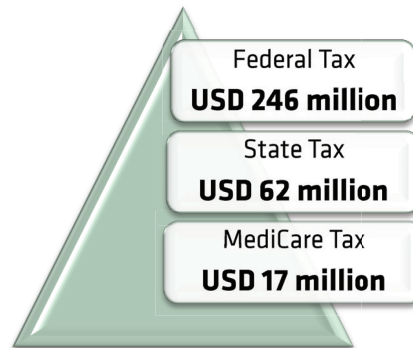
State Profiles

Most of the Indian tech companies have established their US headquarters in the State of California



Large Indian companies with operations in California - Illustrative**

Tax contribution by employees of Indian companies in California State in FY2011



Infosys

- Infosys and University of Southern California (USC) signed an agreement to set up an Infosys-supported Research Center at USC

TCS

- TCS America has R&D partnership with University of California in the security networking domain
- TCS has set up a customer collaboration center in Santa Clara. The center shall focus on developing new technologies such as big data, analytics and mobility to enterprises

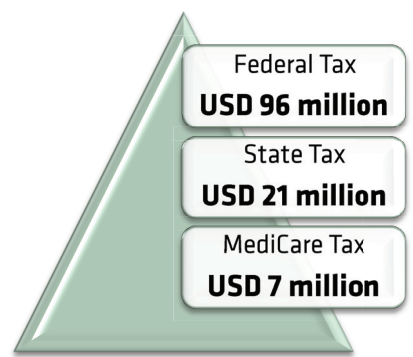
Notes: *It represents the percentage of the direct workforce in California of the total direct workforce in the US
 ** It is the illustrative list of Indian tech companies in California and it is not an exhaustive list
 Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis

The State of Michigan is a hub for Indian companies owing to reasons such as availability of quality talent and favorable policy regime



Large Indian companies with operations in Michigan - Illustrative**

Tax contribution by employees of Indian companies in Michigan State in FY2011



Most of Indian enterprises believe that the State of Michigan provide access to a rich talent pool and strong infrastructure

Aditya Birla

- In February 2011, Aditya Birla Minacs expanded in Michigan with the opening of its second delivery center

TCS

- TCS BPO Services has a center in Midland which is a local BPO delivery center
- In 2010, TCS associates in the state participated in the Walk to Cure Diabetes initiative

Others

- Wipro, Infosys and Cognizant are hiring engineering graduates from the campus of University of Michigan

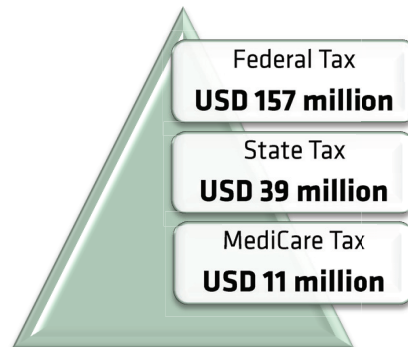
Notes: *It represents the percentage of the direct workforce in Michigan of the total direct workforce in the US
 ** It is the illustrative list of Indian tech companies in Michigan and not the exhaustive list
 Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis

Several Indian companies have opened new centers in New Jersey in their customer's proximity



Large Indian companies with operations in New Jersey - Illustrative**

Tax contribution by employees of Indian companies in **New Jersey** State in FY2011



HCL

- HCL Community Service Council has partnered with agencies in New Jersey to bring the joy of the holiday season into the homes of families in need
- In 2009, HCL invested in next generation Green Data Center in New Jersey thereby increasing its global footprint and meet growing customer demands

Note: *It represents the percentage of the direct workforce in New Jersey of the total direct workforce in the US

**It is the illustrative list of Indian tech companies in New Jersey and not the exhaustive list

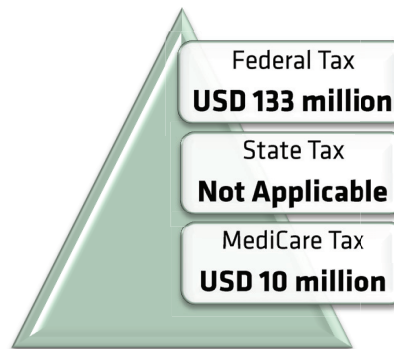
Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis

Texas is one of the top destinations for Indian companies for greenfield investments



Large Indian companies with operations in Texas – Illustrative**

Tax contribution by employees of Indian companies in **Texas** State in FY2011



TCS

- TCS enjoys recruiting from University of Texas at Austin and is Dallas and expecting to hire 2012 graduates for upcoming projects for clients in Texas

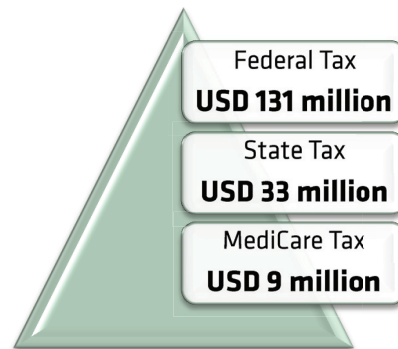
Notes: *It represents the percentage of the direct workforce in Texas of the total direct workforce in the US
 **It is the illustrative list of Indian tech companies in Texas and not the exhaustive list
 Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis

Several Indian companies are hiring US nationals from top tier state schools and technical colleges in Illinois



Large Indian companies with operations in Illinois - Illustrative**

Tax contribution by employees of Indian companies in **Illinois** State in FY2011



Genpact

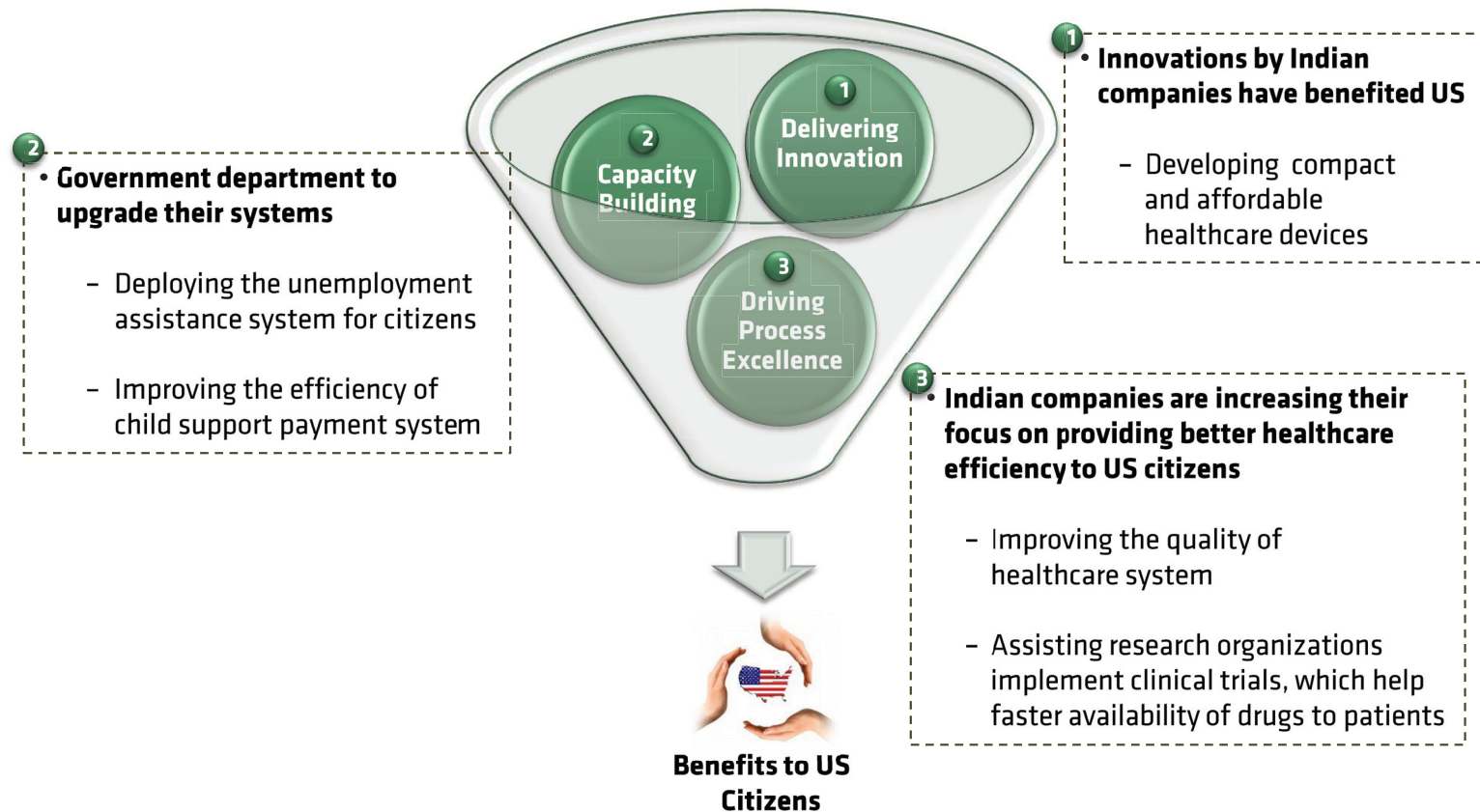
- Genpact expanded their near-client presence in the US with the acquisition of a facility in Danville, Illinois

Notes: *It represents the percentage of the direct workforce in Illinois of the total direct workforce in the US
 **It is the illustrative list of Indian tech companies in Illinois and not the exhaustive list
 Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis



Case Studies

Creating value for the US society by delivering innovations, building capacities and driving process excellence for public good

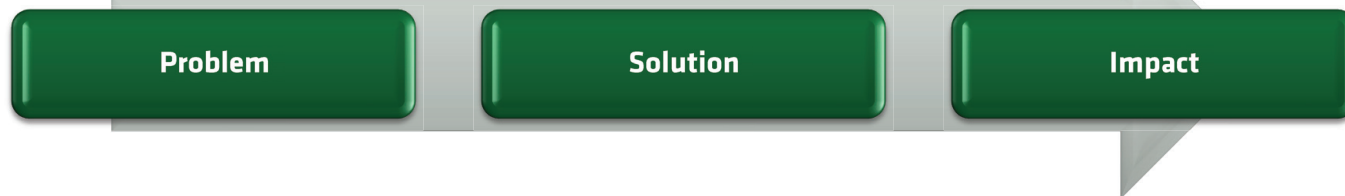
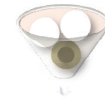


Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis

EXL helped a healthcare insurance provider to reduce SG&A expense significantly and establish a low-cost business model

Industry
Healthcare

Company
EXL Service



• Fortune 100 health insurance providers were facing concerns due to the impact of new healthcare reforms, for instance

- Increase in cost such as expenses related to Selling, General and Administration (SG&A)
- Increase in SG&A* because of expected expansion of membership base, inflation and internal investments

• EXL worked with different business units of the insurance providers, identified improvement opportunities and implemented them, for instance

- Re-engineering of business processes to reduce SG&A expenses
- Implemented performance management process to capture and measure the progress and financial impact of re-engineering

• EXL's solution resulted in the following benefits to the client and citizens

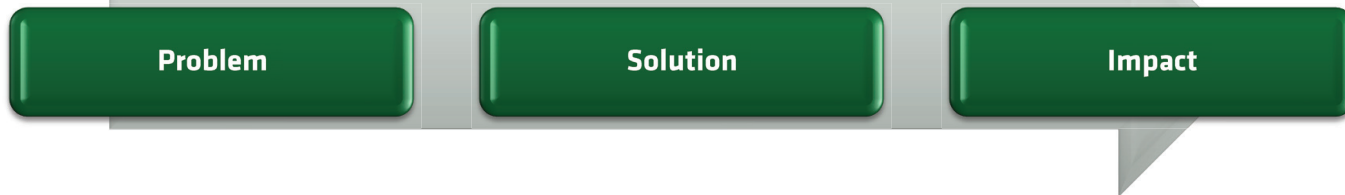
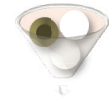
- There was a 15 percent reduction on cost which helped in optimizing the overall cost structure of the healthcare insurance provider
- The reduction in SG&A cost improved the long-term affordability of the product

Note: *SG&A refers to Selling, General & Administrative Expenses
Source: EXL; Company Website, Press Releases

HCL implemented a new collection system to improve the efficiency of child support payment collection of the Nevada State Welfare Unit

Industry
Govt.

Company
HCL



- **Child Support Division of Nevada State dealing with collection of child support payments was struggling with multiple problems such as**
 - Sorting thousands of cash payments received everyday
 - Processing more than 450,000 documents per year
 - Inability to access the needed information related to payments

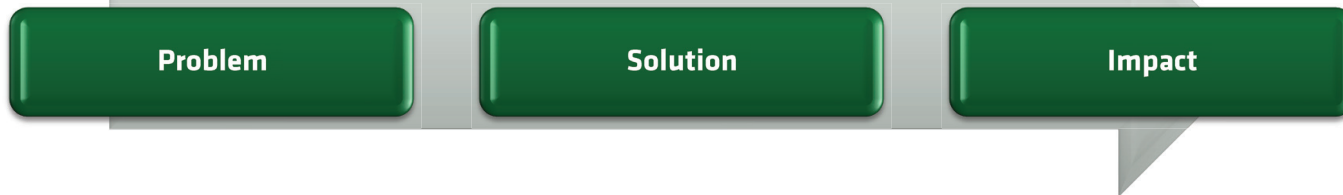
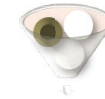
- **HCL developed a system for State Welfare Division that addressed the shortcomings of the current system**
 - The child enforcement payment collections system was automated

- **HCL's solution resulted in the following benefits to the client and citizens**
 - Citizens from different counties of the state can easily search information over the internet
 - The agency spends less time in identifying the case
 - The agency performs correct distribution of payments within 48 hours time frame

Note: The Nevada State Collection and Disbursement Unit (SCaDU), is the state level agency responsible for the collection and disbursement of child support payments
Source: Company Website, Press Releases

Hexaware assisted in the development of a new state toll processing management solution

Industry
Infra. Company
Hexaware



• US State Government Transportation system was facing issues due to legacy computer software i.e.

- Slow processing speed
- Supports less number of transactions*
- Dependency on large number of applications

• Hexaware standardized and delivered a new toll processing management software i.e.

- Hexaware developed customized software using Customer Relationship Management (CRM) system

• Hexaware's solution resulted in the following benefits to the government and citizens

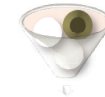
- Increased the capability of high volume transaction
- Increased the flexibility of the system to meet the requirements of the various state transportation bodies
- Improved the capability to support complex and disparate report requirements

Note: *Transaction refers to number of vehicles passing toll booth
Source: Hexaware, Company Website, Press Releases

Infotech Enterprises has designed and developed a small and affordable USB powered ECG monitoring device for the citizens of the US

Industry
Healthcare

Company
Infotech Enterprises

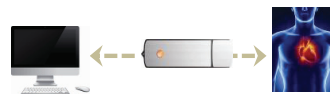


• Citizens face problems with the ECG monitoring process, which was very cumbersome and costly

- About 47 percent of sudden cardiac deaths occur outside a hospital in the US
- Doctor is not able to observe the ECG due to non-availability of handy ECG equipment
- US has the highest per capita healthcare costs

• Infotech Enterprises designed and developed a portable and affordable ECG monitoring system

- USB powered ECG monitors that measure heart rate of a patient
- Resembles a pen drive
- Affordable and compact, easy-to-use



• Infotech Enterprises was able to provide a portable, easy-to-use ECG monitoring system

- Doctor can diagnose patient's condition by observing the ECG of the patient on-the-spot
- Cheap and effective cardiac diagnostics
- Remote monitoring of ECG can be done on any PC with minimal hardware
- ECG monitoring system can be used by individuals at homes

Source: Infotech Enterprises; Company Website, Press Releases

Mastek was able to improve the quality of healthcare services provided to citizens by providing an end-to-end solution

Industry
Healthcare

Company
Mastek



• Healthcare provider was not able to take timely decision due to unavailability of data

- Staff of healthcare provider were not able to access clinical data on mobile

• Mastek delivered an end-to-end solution to healthcare provider for their quality management reporting

- Mastek designed mobile solution for physicians to access clinical data
- Mastek designed the user-experience for healthcare provider

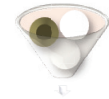
• Mastek's mobile solution resulted in the following benefits to the staff and citizens

- Improved the quality of healthcare services provided to citizens
- Physicians were able to access clinical data on mobile phones
- The solution enabled physicians to get patient's medical history on their mobile and to make timely medical decisions

Source: Mastek

TCS developed a comprehensive Unemployment Insurance system, resulting in great savings in cost and time for the citizens of Mississippi

Industry
Govt. Company
TCS



• The Mississippi Department of Employment Security (MDES) was encumbered with a 30-year-old batch processing Unemployment Insurance

- 30-year-old legacy of Unemployment Insurance system
- Less service options available to Mississippi's employers and claimants

• MDES upgraded its Unemployment Insurance system with the help of TCS

- Internet browser-based system, called ACCESS
- Integrated all Mississippi UI tax functions and processes
- Adoption of Global Network Delivery Model

• MDES was able to provide an improved level of service to the citizens of Mississippi

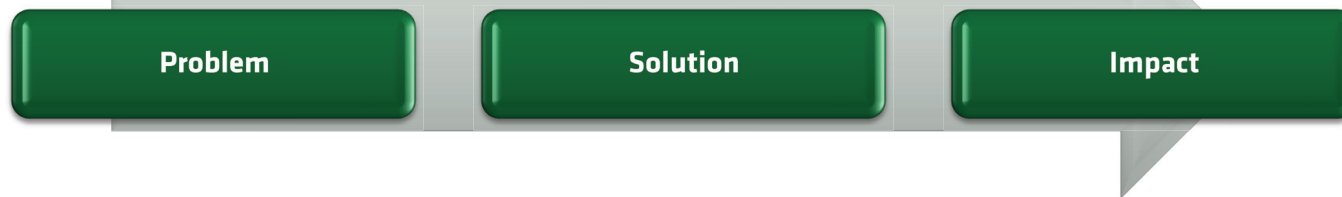
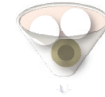
- Able to handle three times the volume with same or less staff
- Better degree of automation
- Savings in costs and efforts for both citizens and employees
- Shift from paper to internet-based user interfaces
- Automated overpayments, resulting in savings of 2,000 person hours per annum

Note: MDES is a federally funded state agency
Source: Company Website, Press Releases

UST Global improved the quality of healthcare system by introducing processes which helped 34 million members of a healthcare provider in the US

Industry
Healthcare

Company
UST Global



• Fortune 1000 healthcare provider's existing Information System was running on legacy application

- Existing Medicare Enrollment Data System on legacy application
- Major functionalities were not present in the system
- Many defects were present in the system
- Losing market share to competitors

• Healthcare provider partnered with UST Global for introducing new processes in the system

- Introduced new processes
- Re-engineering old processes

• Post implementation of web-based application, there were many benefits

- Better user-experience
- Improved the efficiency and effectiveness of serving the clients (senior citizens)
- Application supported 1,000 concurrent users from just two
- Queries that ran for more than 30 minutes were brought down to few milliseconds

Source: UST Global

WNS has been able to provide safety to thousands of lives in the US by developing an improved security solution

Industry
Aviation

Company
WNS



• **Leading airline was not able to conduct watchlist process accurately at US airports and airline offices. Following were some of the key concerns:**

- The process was scattered, exposing potential security threat to passengers
- Due to failure in conducting watchlist checks accurately, the airline was paying a heavy fine to the airport authorities

• **WNS delivered an automated watchlist process for the airline player. Following was the key attribute of the process:**

- WNS developed a solution that runs an autocheck on the list and the PNRs created on the client's system against potential security threat

• **WNS's solution resulted in the following benefits to the airline and its passengers:**

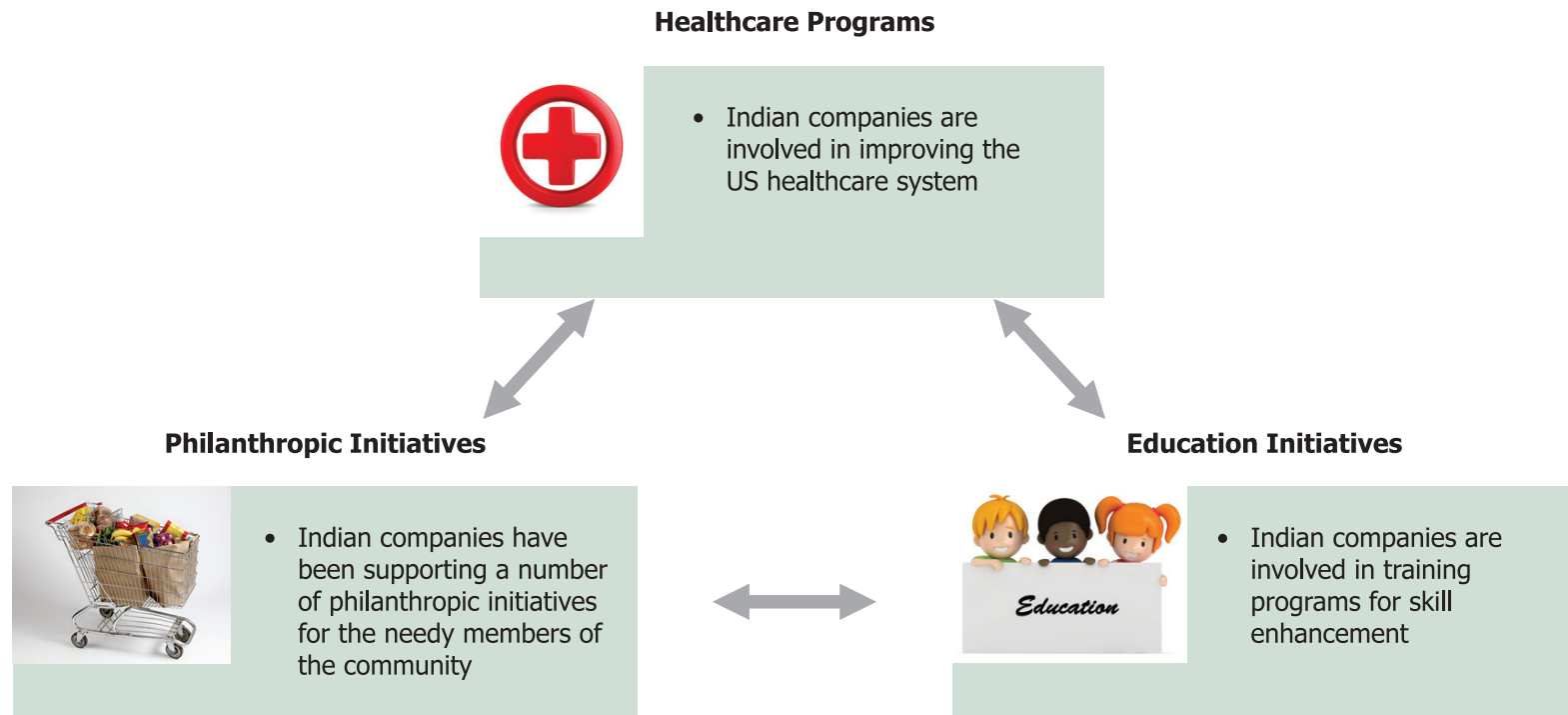
- Due to accurate checks performed, there was a reduction in fines paid by the airline player
- The airline was able to provide security and save thousands of lives against security threats

Source: Company Data

The background of the slide is a blurred, abstract image with shades of green and grey. Two horizontal grey bars are positioned above and below the central text. The text 'CSR Activities' is centered in a white, sans-serif font.






CSR Activities

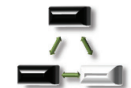
Playing a big role in CSR* initiatives across various areas such as healthcare and education



Note: *CSR refers to Corporate Social Responsibility
Source: NASSCOM Member Survey; Press Releases; Zinnov Analysis

Aditya Birla Minacs partnered with non-profit companies to improve the lives of people through donations, awareness and food drives

Key Partnerships	States	Activity
	California	<ul style="list-style-type: none"> Minacs participated in the Best Buddies Charity event in which 185 employees participated in a 35-mile bike ride and raised funds for the charity
	Michigan	<ul style="list-style-type: none"> It is a fundraiser and awareness event for breast cancer research. 46 employees participated in the race for showcasing their support for breast cancer research
	Wisconsin	<ul style="list-style-type: none"> Nine members from Aditya Birla Minacs's Wisconsin center were incarcerated in a make-believe jail. In order to attain their freedom, other staff had to make donations to the MDA
	Wisconsin	<ul style="list-style-type: none"> Aditya Birla team members at Wisconsin center raised money for a camp for kids living with HIV/AIDS
	Michigan	<ul style="list-style-type: none"> Team members from Michigan center donated money and toys to the Marine Corps' 'Toys for Tots' program
<p>Other Events</p>	Texas	<ul style="list-style-type: none"> Participated in quarterly blood drives to stock the blood banks Collected school supplies for a local elementary school to assist the children that did not have funds Collected items for military members stationed in the Middle East, which included non-perishable food items, clothing and writing materials



Source: Aditya Birla Minacs

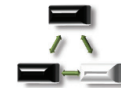
Genpact contributed by supporting causes such as enhancing employability, healthcare, caring for the environment and driving rural employment

GENPACT

Day of Caring



In Wilkes Barre area, 64 volunteers from Genpact supported the 'Day of Caring' initiative



Genpact Irvine center volunteers, set up beds and served dinner. Genpact collects and puts together hygiene kits and school supply drive for Mercy House during the holidays



Genpact holds a blood drive on site each month at Danville and Irvine center

70 employees of Genpact including their friends and families participated in Big Brothers Big Sisters Bowl for Kids Sake and raised funds for supporting the initiative



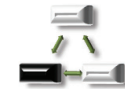
As a part of World Environment Day, Genpact undertook a recycling drive for electronics, aluminum, cardboard, etc.

Other Insights

- Genpact hosts a fundraising campaign. In the campaign, employees have the option of making monetary contribution for wear jeans on Friday's. The funds were deposited with the County Conservation District
- At the Danville center, there is a Relay for Life team which raised funds through lunch sales, popcorn sales
- In March 2011, employees of Irvine center collected shoes for the victims of the Tsunami in Japan

Source: Genpact

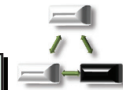
HCL participates in various social activities to make a difference in the lives of people in the US



Key Partnerships	States	Activity
	California	<ul style="list-style-type: none"> HCL organized Lunch Serve event for homeless and needy people in California
	California	<ul style="list-style-type: none"> HCL organized a food sort and pack event, through which the packed food was distributed to the homeless and needy members of the community
	Washington	<ul style="list-style-type: none"> HCL organized a food sort and pack event, through which the packed food was distributed to the homeless and needy members of the community
	New Jersey	<ul style="list-style-type: none"> Dinner Serve and Clean-Up event
Herbert Hoover National Historic Site	Iowa	<ul style="list-style-type: none"> Environment Service event in which volunteers helped with Tallgrass Prairie Reconstruction at Herbert Hoover National Historic Site to improve public lands
City Team	California	<ul style="list-style-type: none"> HCL addressed the needs of low-income households during Christmas and holiday season In 2009, HCL adopted two families and in 2010, HCL was able to add four more families

Source: HCL Technologies

Infosys US Foundation has provided students with the opportunity to improve their science and math skills by providing grants



"Infosys has been a leading supporter of our work and their grant will help us scale up and catalyze other funders to take action"

Director of K-12 Education at the New York Academy of Science (NYAS)

Focus of the Program

- Train and mentor students of underserved communities of New York and Citizen Schools of New Jersey
- Provide courses on Science, Technology, Engineering and Maths (STEM) are the core focus areas

The Impact

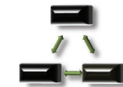
- Placed more than 120 mentors in 84 afterschools in New York City
- Served more than 2,100 elementary and middle school children
- Provided monetary contribution to the New York City Science Education Initiative of the NYAS

Future Plan

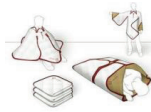
- To recruit, train and support 30 new mentors
- Provide 180 hours of hands-on activities for 450 students in the fourth through eighth grades in an afterschool setting
- Help students in increasing their skills in number of STEM-related areas such as:
 - Genetics
 - Space science
 - Earth science
 - Math

Source: Company Websites

TCS has made contributions to various organizations in the US for supporting number of causes such as disaster relief, education and health



Disaster relief



- Within days of the hurricane, TCS, worked jointly with the Mississippi Department of Employment Security and deployed self-service Disaster Unemployment Assistance System for the residents
- In addition to the voluntary support, TCS also contributed funds toward relief efforts

Education



- TCS along with First Book organization distributed 65,000 new books to children in need across the US
- TCS partnered with the Columbus Center of Science and Industries (COSI) for its 'Wheels Program'. Through the partnership, TCS arranged the exhibits from the COSI Museum in Ohio for students of rural schools in Ohio

Health



- In 2010, TCS donated a portion of its profit from the US to charities such as the American Cancer Society, Walk for Hope and United Way
- More than 50 of TCS's associates in Motor City, Detroit, participated in the Walk to Cure Diabetes organized by the Juvenile Diabetes Research Foundation

Source: FICCI; TCS Websites; Press Releases

Wipro has been working closely with the local communities in the US to improve the lives of US citizens



Commitment to Local Communities

- Wipro has become one of the city's largest job creators in Atlanta
- Wipro inaugurated the Atlanta development center in 2008 to centralize its US delivery operations
- Nearly 80 percent of Wipro's Atlanta workforce are US citizens

Recruitment Strategy for American Veterans

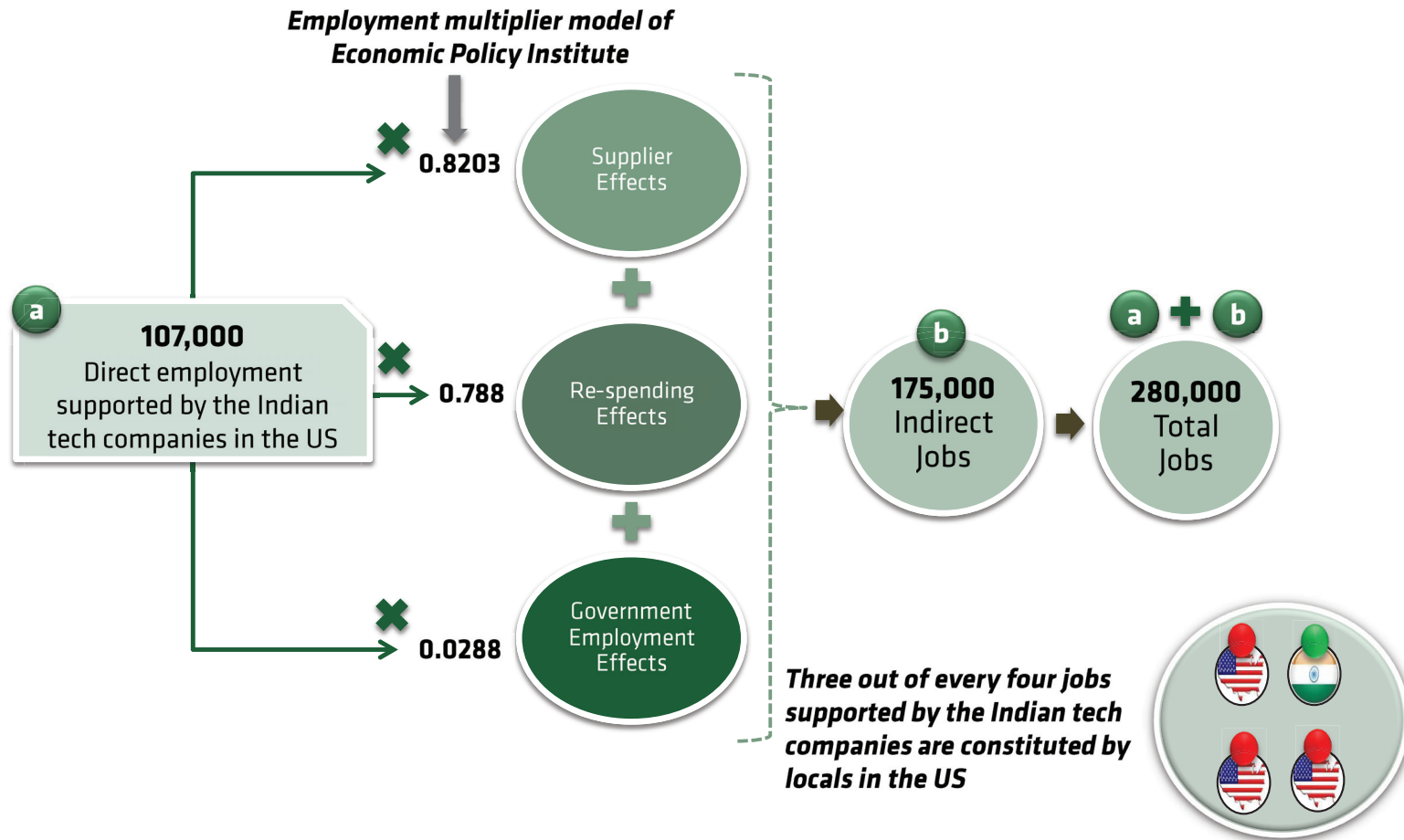
- Wipro began a Veterans Training and Employment Program in partnership to increase the employability of veterans in the software industry
- The program is currently in the initial stage and it is expected to create 400 jobs

Source: Wipro

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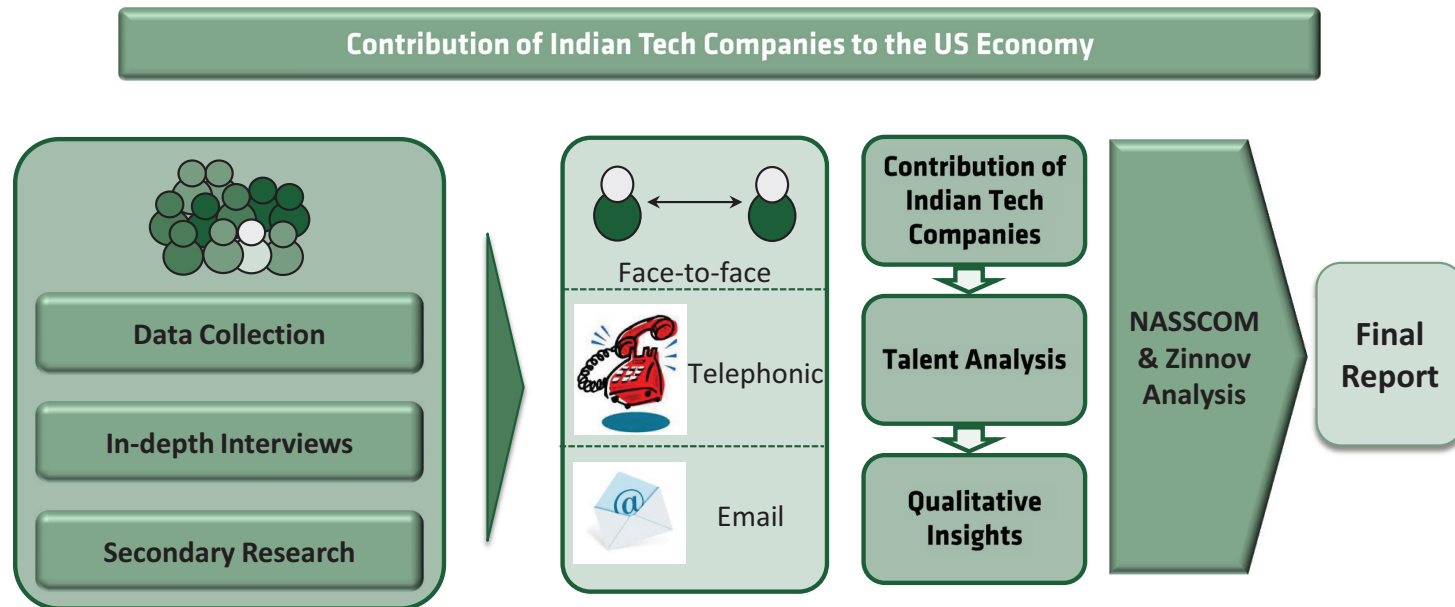
Appendix

Indirect Employment Methodology - EPI model



Note: Indirect employment has been calculated on the basis of employment multiplier model of Economic Policy Institute at Washington DC
Source: Zinnov Analysis

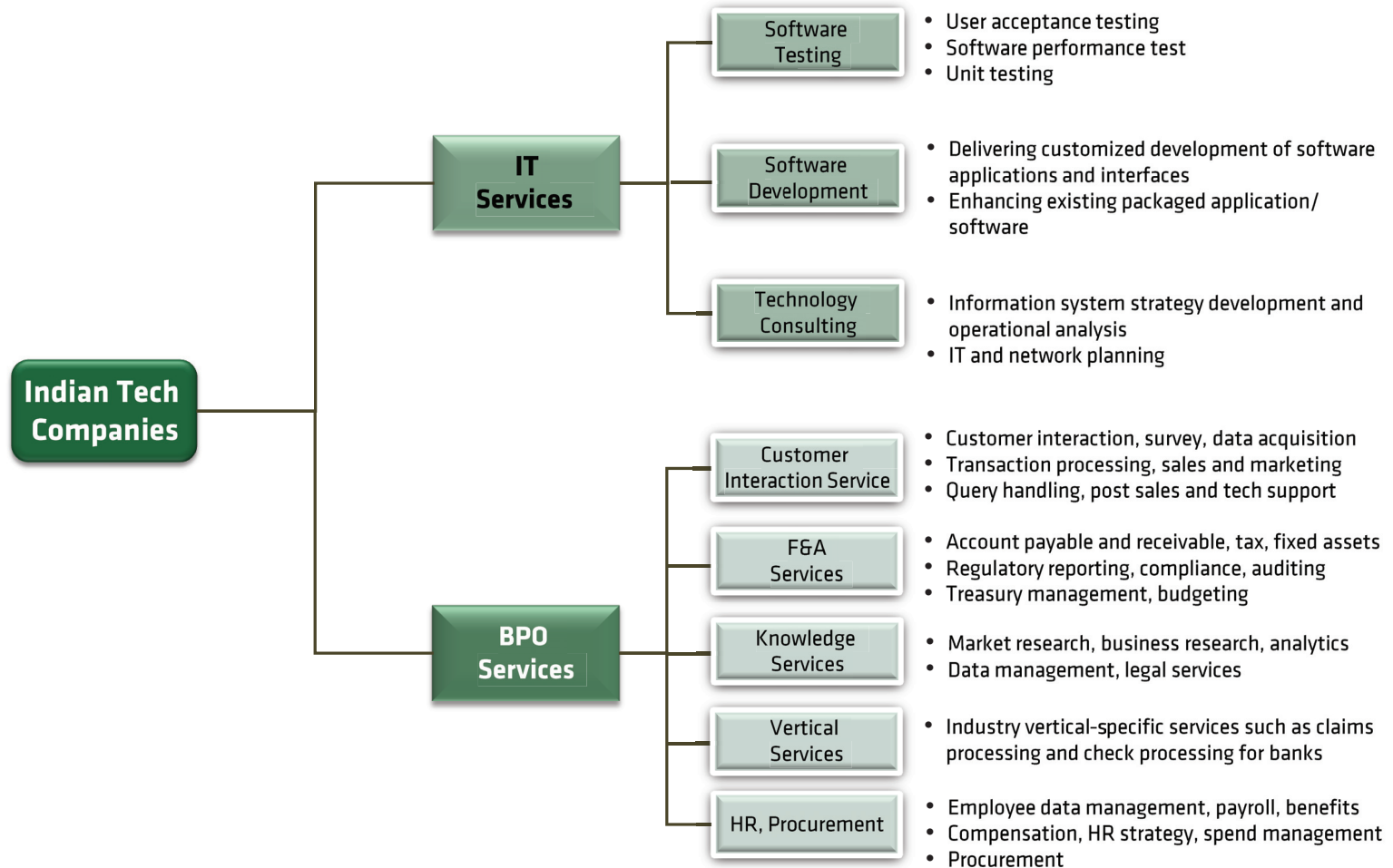
A robust methodology was followed to collect data across various parameters of Indian tech companies contribution to the US society



	Total Revenue	More than USD 5 billion	Between USD 1 billion and 5 billion	Less than USD 1 billion
Demographics of Participating Companies	Percentage of Total Companies	19%	19%	62%
	Share of Total Exports	28%	14%	5%

Note: Sample size included in the survey constitutes more than 60 percent revenues of the industry
 Source: NASSCOM Member Survey

Definition of Indian tech companies



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