

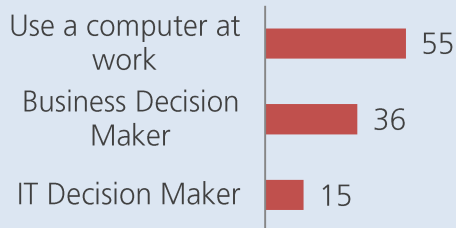
2010 BSA Global Software Piracy Study

India Support for Intellectual Property Rights

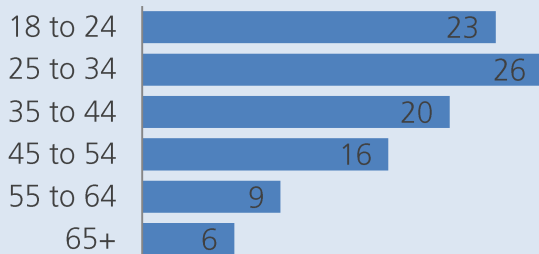
Survey Details

- All respondents installed software in the last year
- 55% use a computer at work
- Gender break 56/44 male/female
- Survey conducted face to face Jan 20- Feb 23, 2011

Work use



Age of Respondents



Support for IPR

- Indian respondents show muted support for innovators and intellectual property rights.
 - 63% say innovators should be rewarded, below the global average of 71%. Likewise 59% say intellectual property rewards creativity, well below the global 73%.
 - However, most also say IP promotes local jobs (61% vs. 61% globally) and IP benefits local economies (57% vs. 59% globally).

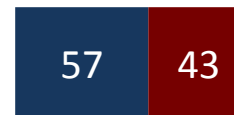
Inventors should be rewarded vs. Benefits should flow to society



Intellectual property rights creates jobs vs. IPR too expensive



Intellectual property rights benefits local econ vs. IPR helps Multi-Nationals



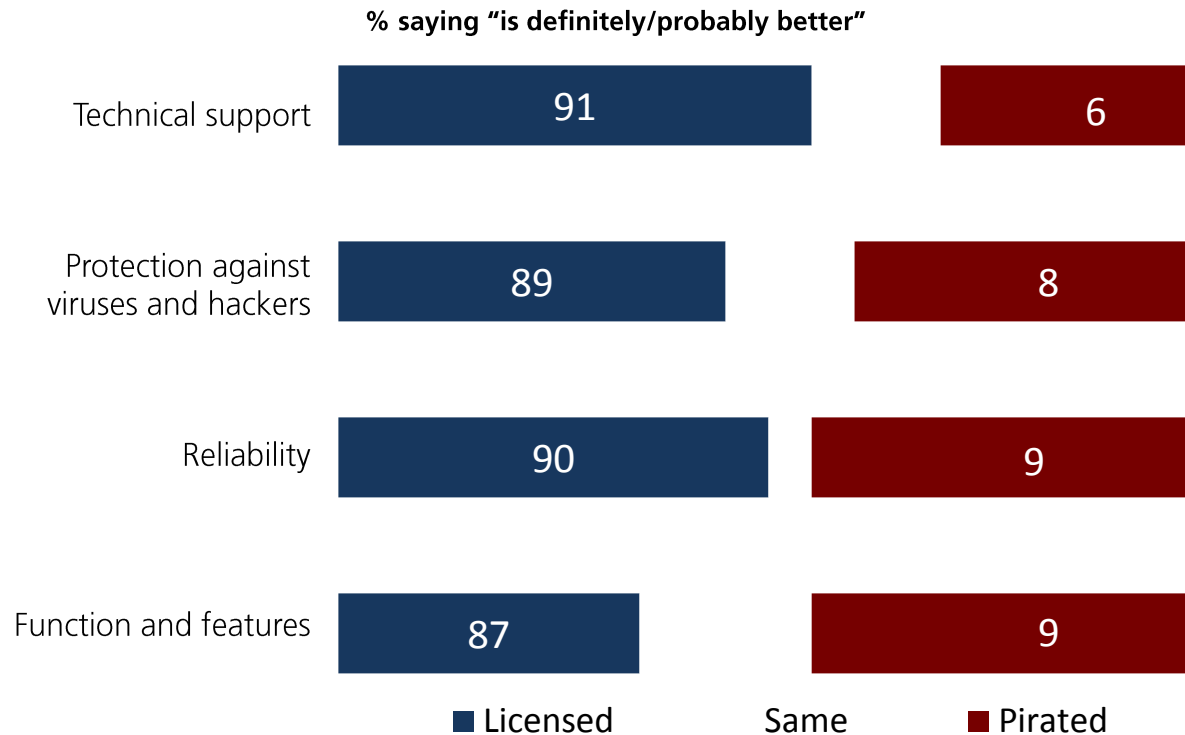
■ Pro-IP DK/NS ■ Anti-IP

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India Preference for Licensed Software

Licensed vs. Pirated Software

- There is also a broad acknowledgement that licensed software is superior to unlicensed software.
 - Indian consumers believe that access to technical support (91% vs. 88% globally) and the reliability of licensed software (90% vs. 81% global) are the biggest advantages licensed has over unlicensed



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India Awareness of Software Acquisition Channels

Channel Legality

- Indian consumers have a fairly clear understanding of what is legal vs. illegal ways to acquire software.
 - The only acquisition paths thought legal by a majority of Indian respondents are retail sales (80%) and preinstalled software (88%).
 - Less than half of Indian respondents say that other forms of software acquisition are legal – including software “loaned” by friends (44% vs. 39% globally), peer-to-peer networks (38% vs. 36% globally), and street markets (12% vs. 26% globally).

