



### **Emerging Markets Survey**

How many sites outside of the UK do you currently have?

In which of these emerging markets do you currently operate?

In which of the below emerging markets do you plan to operate within the next twelve to twenty-four months?

Which of those is your number one priority?

What are the three most important challenges when setting up and managing a site in an emerging market?

In terms of extending your network in an emerging market, which of these does your company consider to be of most value from your network provider?

What are the two most significant data network challenges after setting up an infrastructure in emerging markets?

How long do you think it takes to set up and be fully running in a new market?

In what way is the current global economic slowdown making you review your emerging market investment plans?

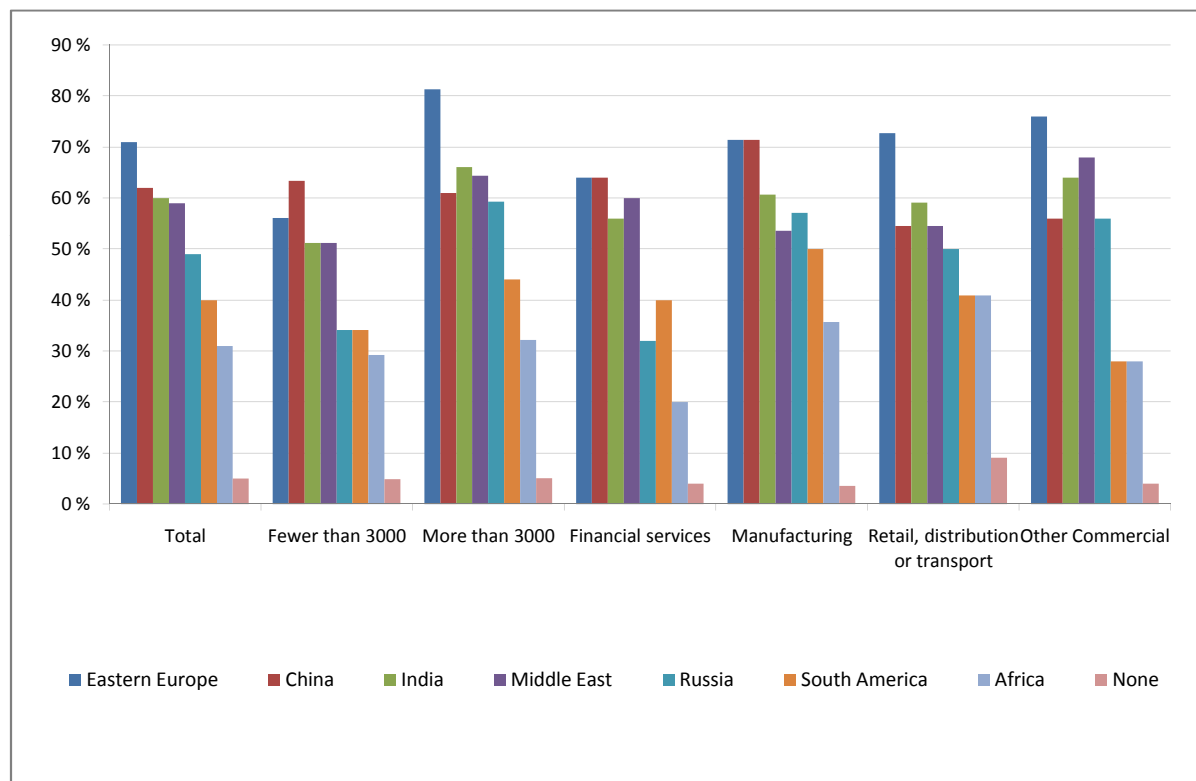
Is the current global economic slowdown affecting the choice of emerging markets in which you invest?

Do you think that the global economic slowdown will detract from the investment appeal that emerging markets have for your company over the next 1-2 years?



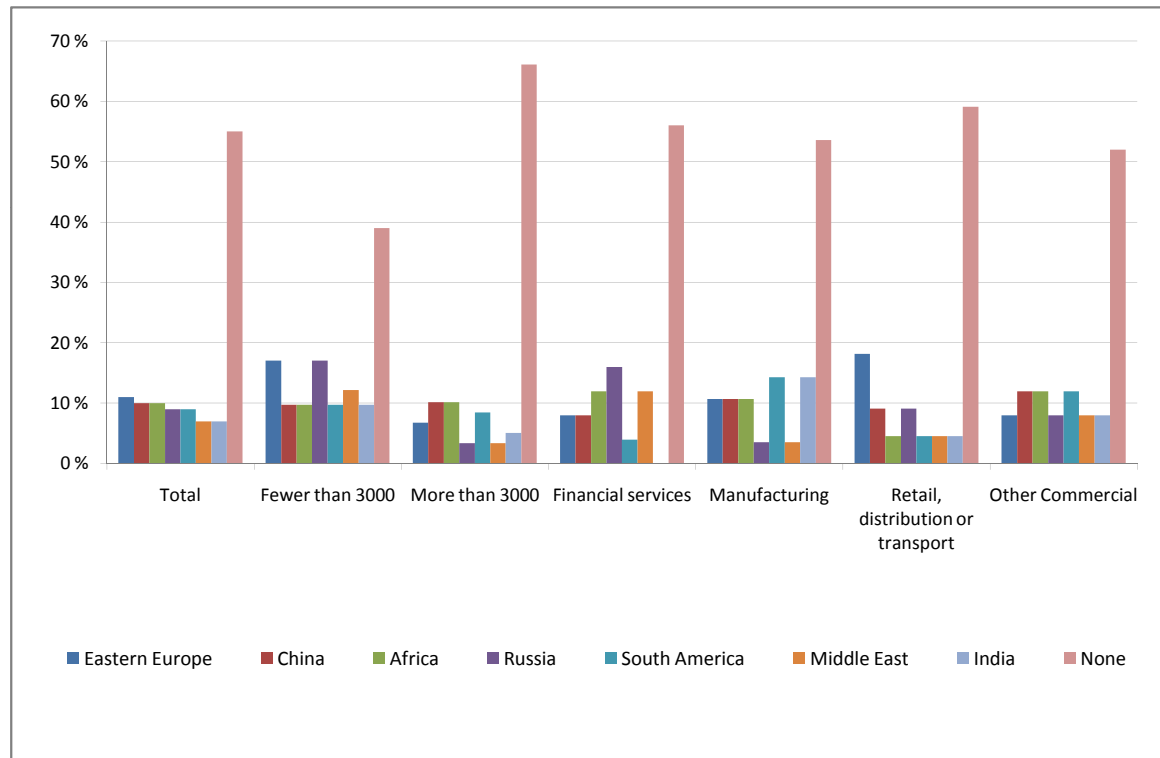
**In which of these emerging markets do you currently operate?**

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>Eastern Europe</b>	<b>71 %</b>	56 %	81 %	64 %	71 %	73 %	76 %
<b>China</b>	<b>62 %</b>	63 %	61 %	64 %	71 %	55 %	56 %
<b>India</b>	<b>60 %</b>	51 %	66 %	56 %	61 %	59 %	64 %
<b>Middle East</b>	<b>59 %</b>	51 %	64 %	60 %	54 %	55 %	68 %
<b>Russia</b>	<b>49 %</b>	34 %	59 %	32 %	57 %	50 %	56 %
<b>South America</b>	<b>40 %</b>	34 %	44 %	40 %	50 %	41 %	28 %
<b>Africa</b>	<b>31 %</b>	29 %	32 %	20 %	36 %	41 %	28 %
<b>None</b>	<b>5 %</b>	5 %	5 %	4 %	4 %	9 %	4 %



In which of the below emerging markets do you plan to operate within the next twelve to twenty-four months?

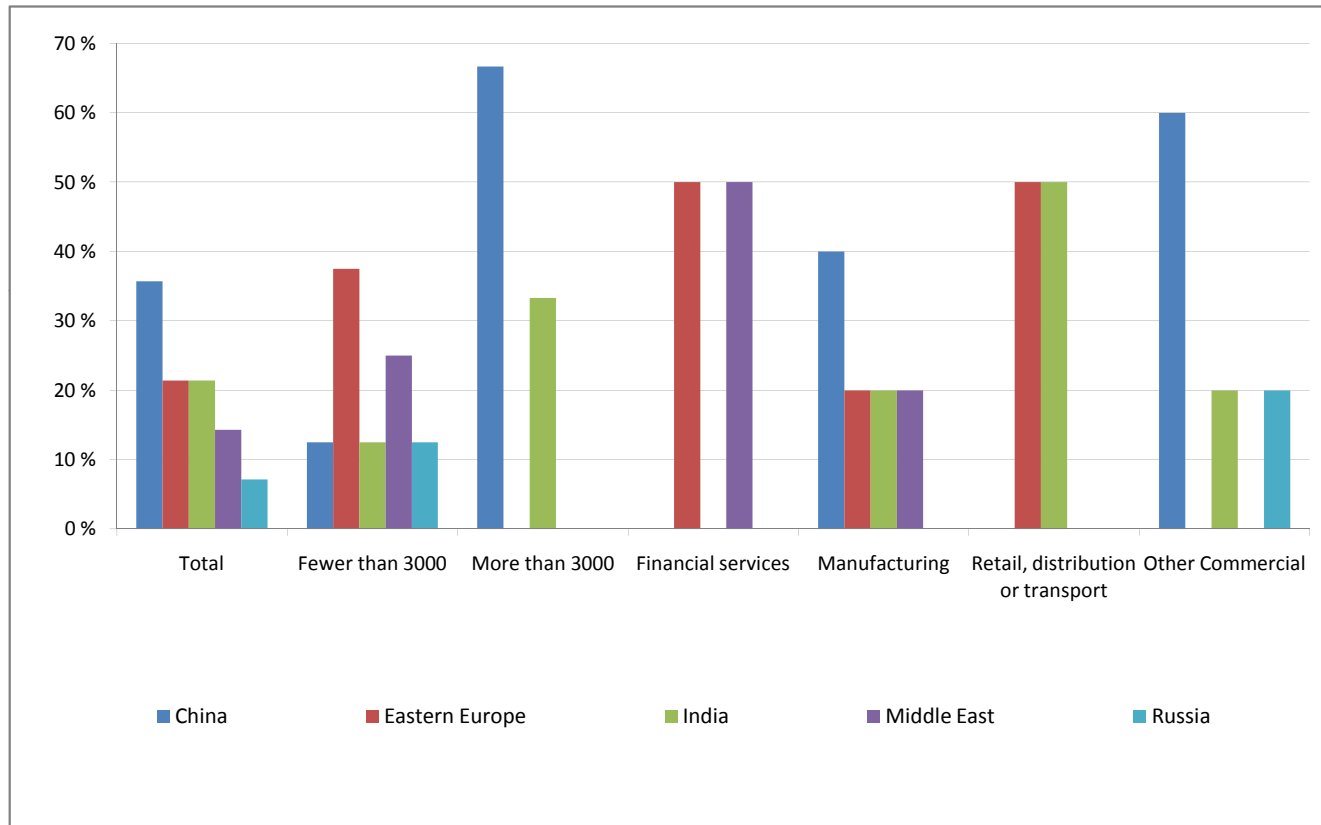
	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
Eastern Europe	11 %	17 %	7 %	8 %	11 %	18 %	8 %
China	10 %	10 %	10 %	8 %	11 %	9 %	12 %
Africa	10 %	10 %	10 %	12 %	11 %	5 %	12 %
Russia	9 %	17 %	3 %	16 %	4 %	9 %	8 %
South America	9 %	10 %	8 %	4 %	14 %	5 %	12 %
Middle East	7 %	12 %	3 %	12 %	4 %	5 %	8 %
India	7 %	10 %	5 %	0 %	14 %	5 %	8 %
None	55 %	39 %	66 %	56 %	54 %	59 %	52 %



### Which of those is your number one priority?

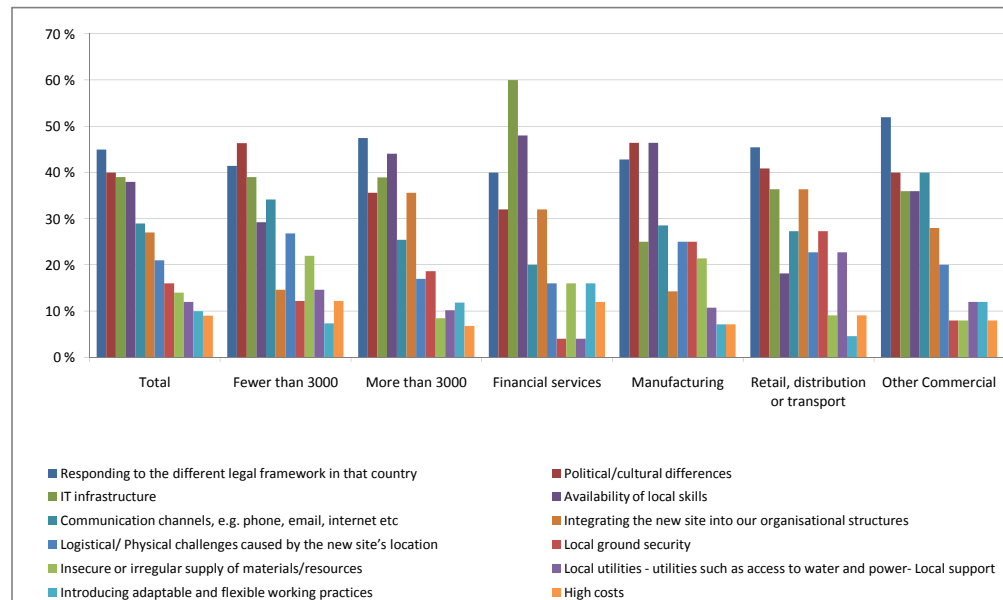
Base: Those planning to operate in one of the listed emerging markets

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>China</b>	<b>36 %</b>	13 %	67 %	0 %	40 %	0 %	60 %
<b>Eastern Europe</b>	<b>21 %</b>	38 %	0 %	50 %	20 %	50 %	0 %
<b>India</b>	<b>21 %</b>	13 %	33 %	0 %	20 %	50 %	20 %
<b>Middle East</b>	<b>14 %</b>	25 %	0 %	50 %	20 %	0 %	0 %
<b>Russia</b>	<b>7 %</b>	13 %	0 %	0 %	0 %	0 %	20 %



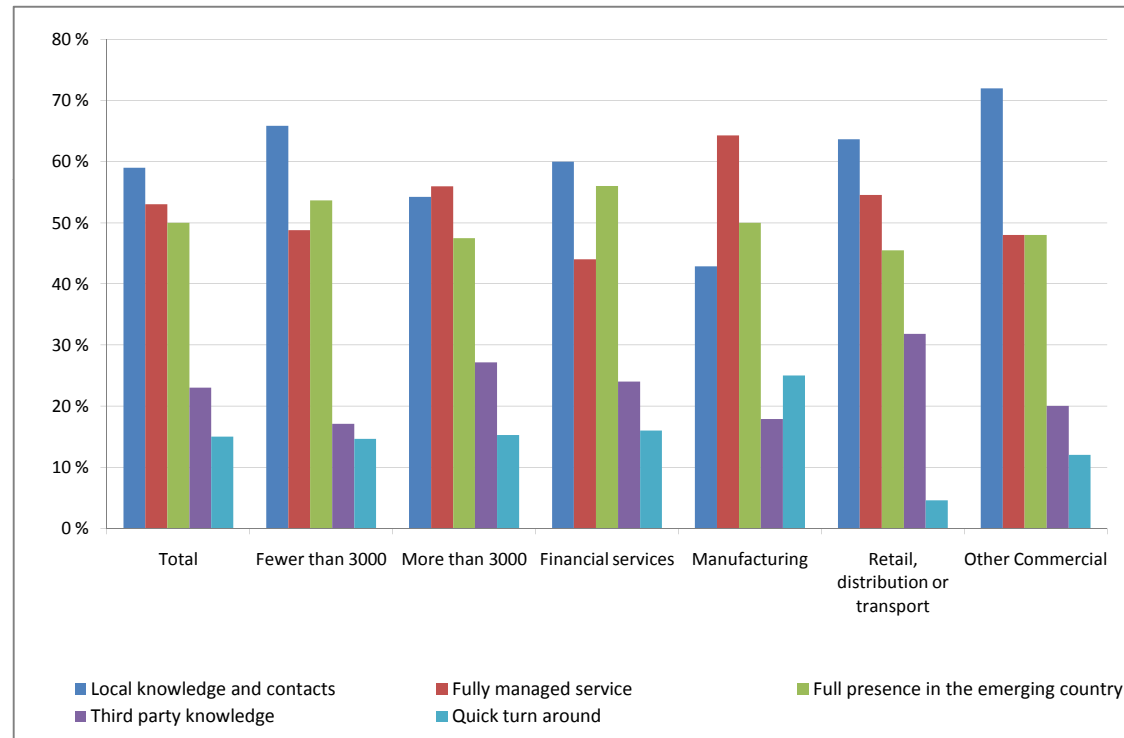
What are the three most important challenges when setting up and managing a site in an emerging market?

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
Responding to the different legal framework in that country	45 %	41 %	47 %	40 %	43 %	45 %	52 %
Political/cultural differences	40 %	46 %	36 %	32 %	46 %	41 %	40 %
IT infrastructure	39 %	39 %	39 %	60 %	25 %	36 %	36 %
Availability of local skills	38 %	29 %	44 %	48 %	46 %	18 %	36 %
Communication channels, e.g. phone, email, internet etc	29 %	34 %	25 %	20 %	29 %	27 %	40 %
Integrating the new site into our organisational structures	27 %	15 %	36 %	32 %	14 %	36 %	28 %
Logistical/ Physical challenges caused by the new site's location	21 %	27 %	17 %	16 %	25 %	23 %	20 %
Local ground security	16 %	12 %	19 %	4 %	25 %	27 %	8 %
Insecure or irregular supply of materials/resources	14 %	22 %	8 %	16 %	21 %	9 %	8 %
Local utilities - utilities such as access to water and power- Local support	12 %	15 %	10 %	4 %	11 %	23 %	12 %
Introducing adaptable and flexible working practices	10 %	7 %	12 %	16 %	7 %	5 %	12 %
High costs	9 %	12 %	7 %	12 %	7 %	9 %	8 %



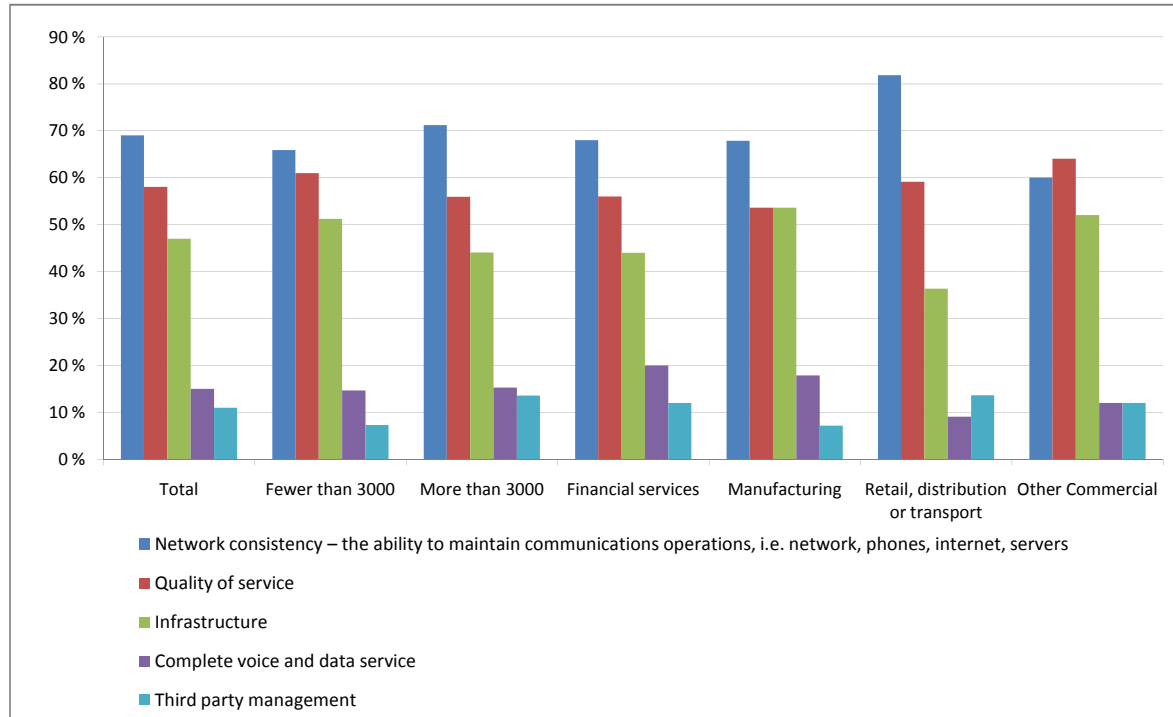
In terms of extending your network in an emerging market, which of these does your company consider to be of most value from your network provider?

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
Local knowledge and contacts	59 %	66 %	54 %	60 %	43 %	64 %	72 %
Fully managed service	53 %	49 %	56 %	44 %	64 %	55 %	48 %
Full presence in the emerging country	50 %	54 %	47 %	56 %	50 %	45 %	48 %
Third party knowledge	23 %	17 %	27 %	24 %	18 %	32 %	20 %
Quick turn around	15 %	15 %	15 %	16 %	25 %	5 %	12 %



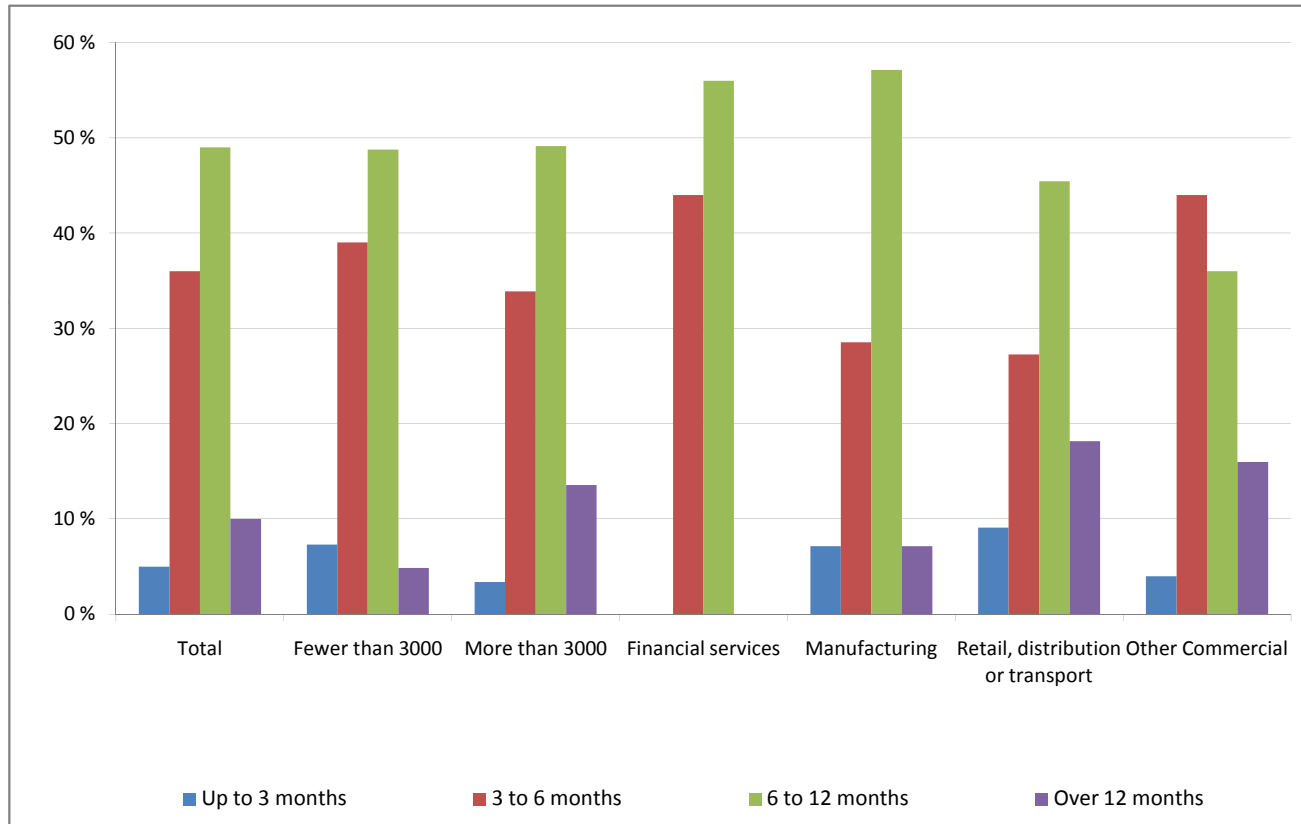
**What are the two most significant data network challenges after setting up an infrastructure in emerging markets?**

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>Network consistency – the ability to maintain communications operations, i.e. network, phones, internet, servers</b>	69 %	66 %	71 %	68 %	68 %	82 %	60 %
<b>Quality of service</b>	58 %	61 %	56 %	56 %	54 %	59 %	64 %
<b>Infrastructure</b>	47 %	51 %	44 %	44 %	54 %	36 %	52 %
<b>Complete voice and data service</b>	15 %	15 %	15 %	20 %	18 %	9 %	12 %
<b>Third party management</b>	11 %	7 %	14 %	12 %	7 %	14 %	12 %



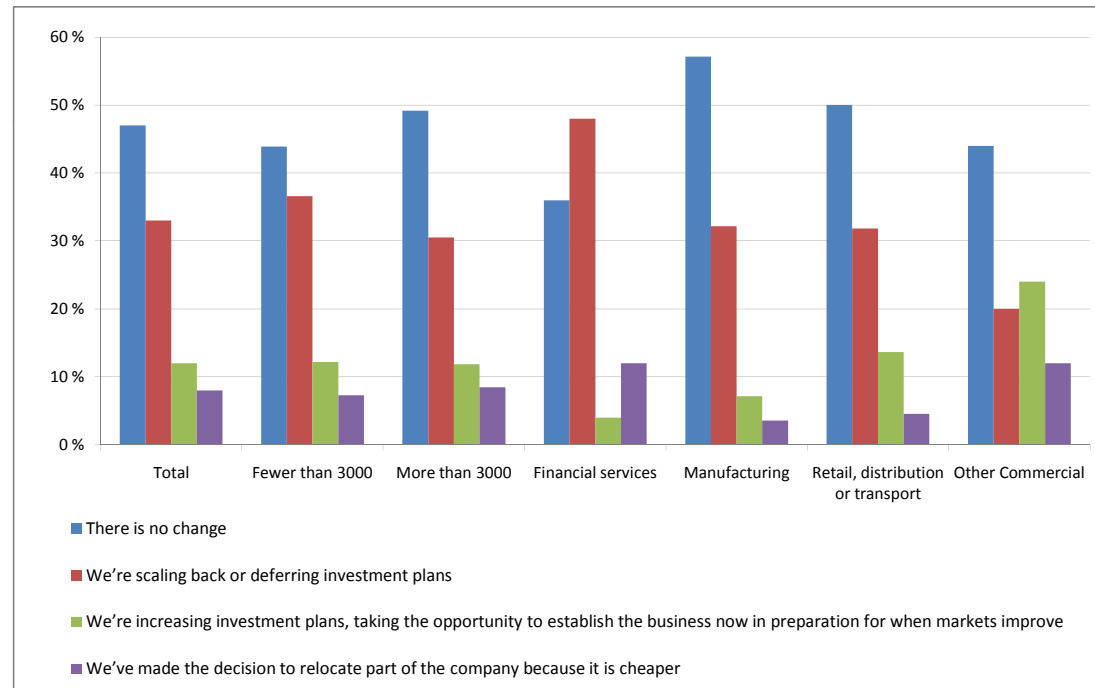
How long do you think it takes to set up and be fully running in a new market?

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>Up to 3 months</b>	5 %	7 %	3 %	0 %	7 %	9 %	4 %
<b>3 to 6 months</b>	36 %	39 %	34 %	44 %	29 %	27 %	44 %
<b>6 to 12 months</b>	49 %	49 %	49 %	56 %	57 %	45 %	36 %
<b>Over 12 months</b>	10 %	5 %	14 %	0 %	7 %	18 %	16 %



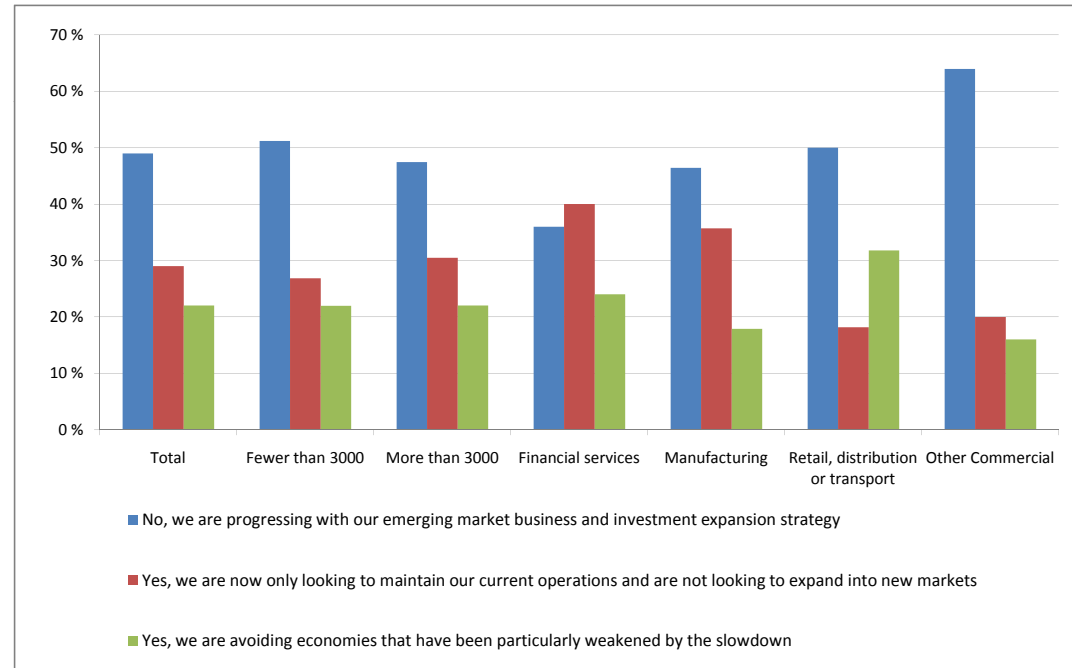
**In what way is the current global economic slowdown making you review your emerging market investment plans?**

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>There is no change</b>	47 %	44 %	49 %	36 %	57 %	50 %	44 %
<b>We're scaling back or deferring investment plans</b>	33 %	37 %	31 %	48 %	32 %	32 %	20 %
<b>We're increasing investment plans, taking the opportunity to establish the business now in preparation for when markets improve</b>	12 %	12 %	12 %	4 %	7 %	14 %	24 %
<b>We've made the decision to relocate part of the company because it is cheaper</b>	8 %	7 %	8 %	12 %	4 %	5 %	12 %



**Is the current global economic slowdown affecting the choice of emerging markets in which you invest?**

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>No, we are progressing with our emerging market business and investment expansion strategy</b>	49 %	51 %	47 %	36 %	46 %	50 %	64 %
<b>Yes, we are now only looking to maintain our current operations and are not looking to expand into new markets</b>	29 %	27 %	31 %	40 %	36 %	18 %	20 %
<b>Yes, we are avoiding economies that have been particularly weakened by the slowdown</b>	22 %	22 %	22 %	24 %	18 %	32 %	16 %



**Do you think that the global economic slowdown will detract from the investment appeal that emerging markets have for your company over the next 1-2 years?**

	Total	Fewer than 3000	More than 3000	Financial services	Manufacturing	Retail, distribution or transport	Other Commercial
<b>Yes</b>	<b>34 %</b>	29 %	37 %	44 %	32 %	41 %	20 %
<b>No</b>	<b>32 %</b>	24 %	37 %	28 %	32 %	23 %	44 %
<b>Maybe</b>	<b>34 %</b>	46 %	25 %	28 %	36 %	36 %	36 %

