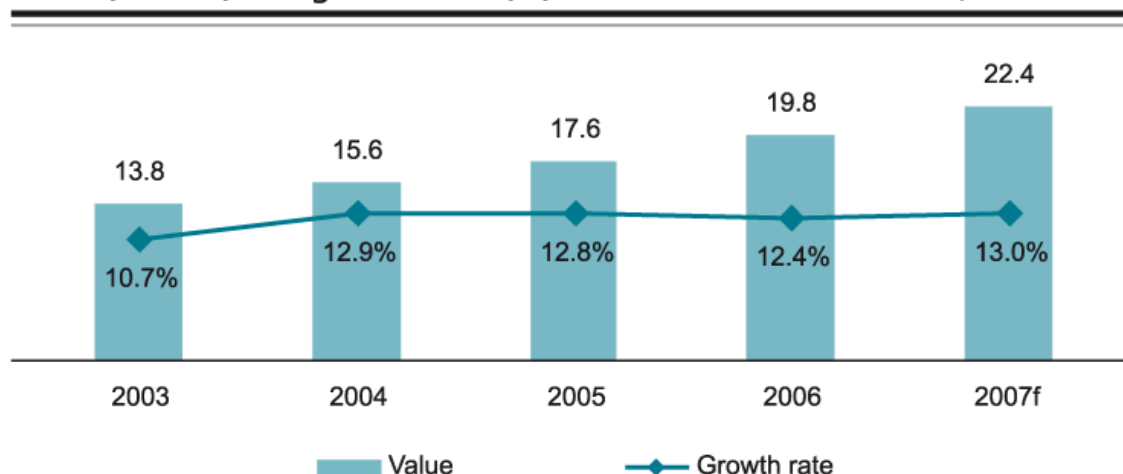


Polish IT market worth PLN 20bn

The Polish IT market totaled PLN 19.8bn last year, up 12.4% on 2005, according to „IT market in Poland 2007-2010,” a report published by PMR, a research and consulting firm. 2006 marked the fourth consecutive year of double-figure growth for the Polish IT market. The situation in the sector is seen as relatively stable and the outlook is bright.

The year 2006 in the Polish IT sector was marked by frustrated expectations of major IT tenders in the public sector, which suffered chronic delays. Yet despite the lack of any spectacular projects from the government, the rate of growth of the Polish IT market remained at double-digit levels in 2006, although it eased slightly compared to two preceding years.

Value (PLN bn) and growth rate (%) of the IT market in Poland, 2003-2007



f – forecast

Source: PMR, „IT market in Poland 2007-2010”

www.pmrpublications.com



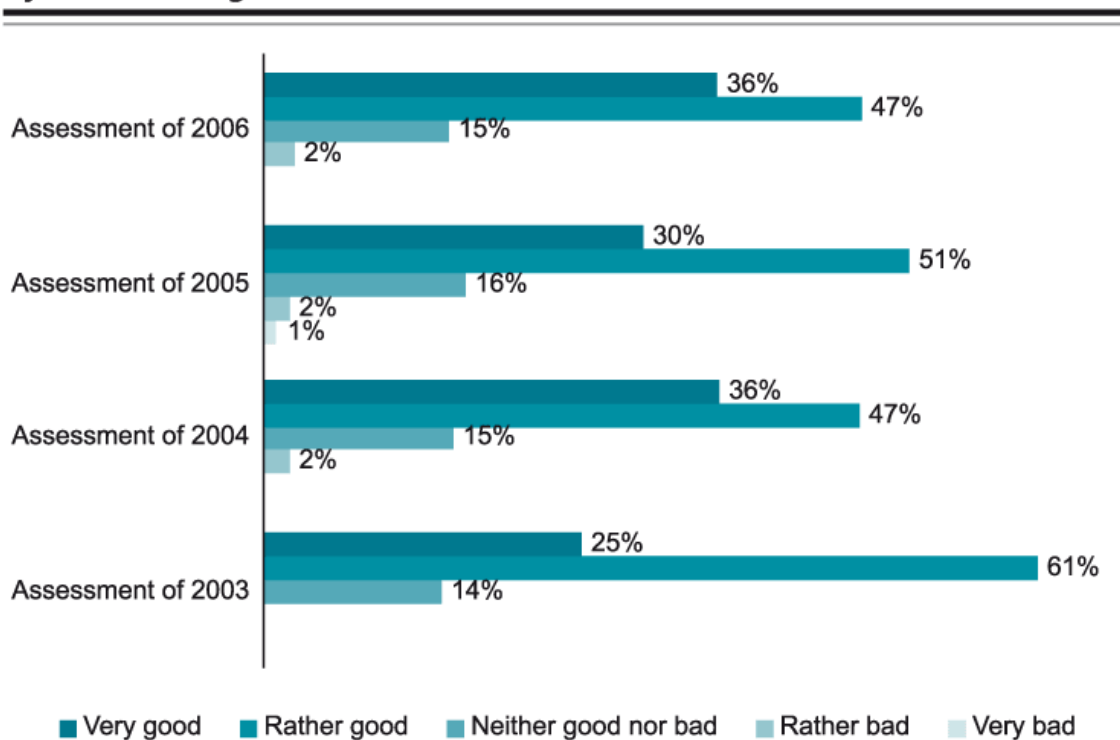
According to the estimates of PMR, the research and consulting firm, in its latest report „IT market in Poland 2007-2010”, the value of the Polish IT market grew by 12.4% in 2006, to PLN 19.8bn. „On the one hand, the rate of growth is somewhat surprising given the delays in major IT tenders in the public sector and the poor coordination of IT development policy between the central and local government levels. On the other hand, these problems are hardly new for the Polish IT sector”, comments Pawel Olszynka, analyst at PMR and one of the report’s authors.

As a result, market participants are paying increased attention to other customer groups, mainly SMEs, as potential sources of growth, although they continue to emphasise the importance of government IT tenders. More IT firms are also pursuing growth opportunities in export markets.

A survey among executives at Poland's 200 largest IT firms conducted as part of the report shows the situation in the Polish IT sector is seen as relatively stable. In general, respondents gave a positive assessment of their companies' performance in 2006, with 83% saying 2006 was good for their companies, including 36% of respondents who said the year was "very good".

The graph below illustrates the surveyed firms' assessments of their performance in the years 2003 through 2006. We may note that the ratings for 2006 are slightly more favorable than for 2005 and the same as for 2004.

Assessment of own performance in the years 2003-2006 by Poland's largest IT firms



Based on a survey of Poland's 200 largest IT firms conducted by PMR in May and June 2007. Source: PMR, "IT market in Poland 2007-2010"

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The outlook is bright for the Polish IT market, according to Poland's largest IT firms. The overwhelming majority of respondents (96%) said the value of the Polish IT market would grow in 2007, and a similar percentage predicted growth in 2008. According to the surveyed firms, the Polish IT market will grow by an average of 15% year-on-year in the years 2007-2008.

Other interesting data in the report

What are currently the major opportunities driving growth in the Polish IT market?



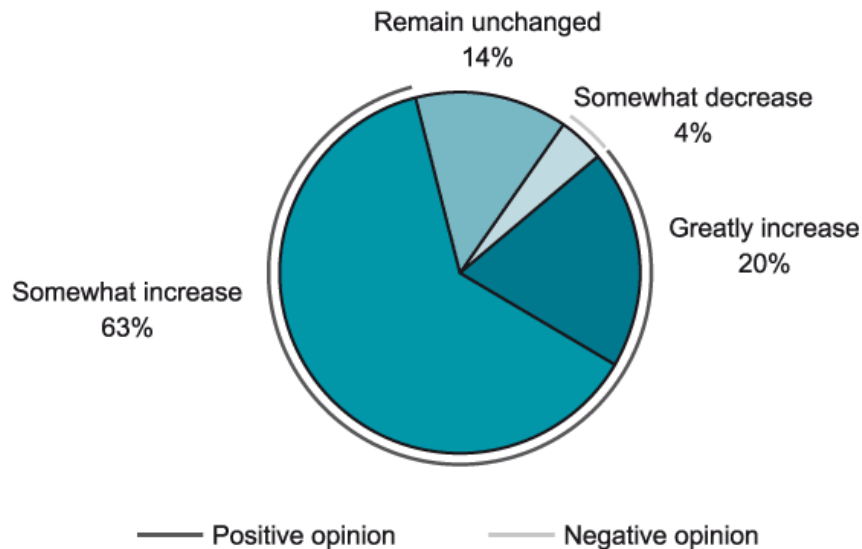
Based on a survey of Poland's 200 largest IT firms conducted by PMR in May and June 2007. Source: PMR, "IT Market in Poland 2007-2010"

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According to executives at Poland's largest IT firms, the major factors driving growth in the Polish IT sector are currently utilisation of EU funds by Polish firms and improved economic situation in Poland, both cited by 44% of respondents. These two factors were also named as the main growth drivers in last year's edition of the PMR survey, but the percentage of respondents citing EU funds as the main source of growth rose by 10 percentage points this year and those mentioning the economy by 6 points.

Over the next two years, will interest in IT outsourcing services among Polish firms...



*Based on a survey of Poland's 200 largest IT firms conducted by PMR in May and June 2007.
Source: PMR, "IT market in Poland 2007-2010"*

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One set of questions put to respondents in the survey of Poland's 200 largest IT firms conducted as part of the PMR report gauged their views about the Polish market for IT outsourcing. More than 80% of the surveyed firms said interest in IT outsourcing services in Poland would increase greatly or moderately over the next two years.

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