

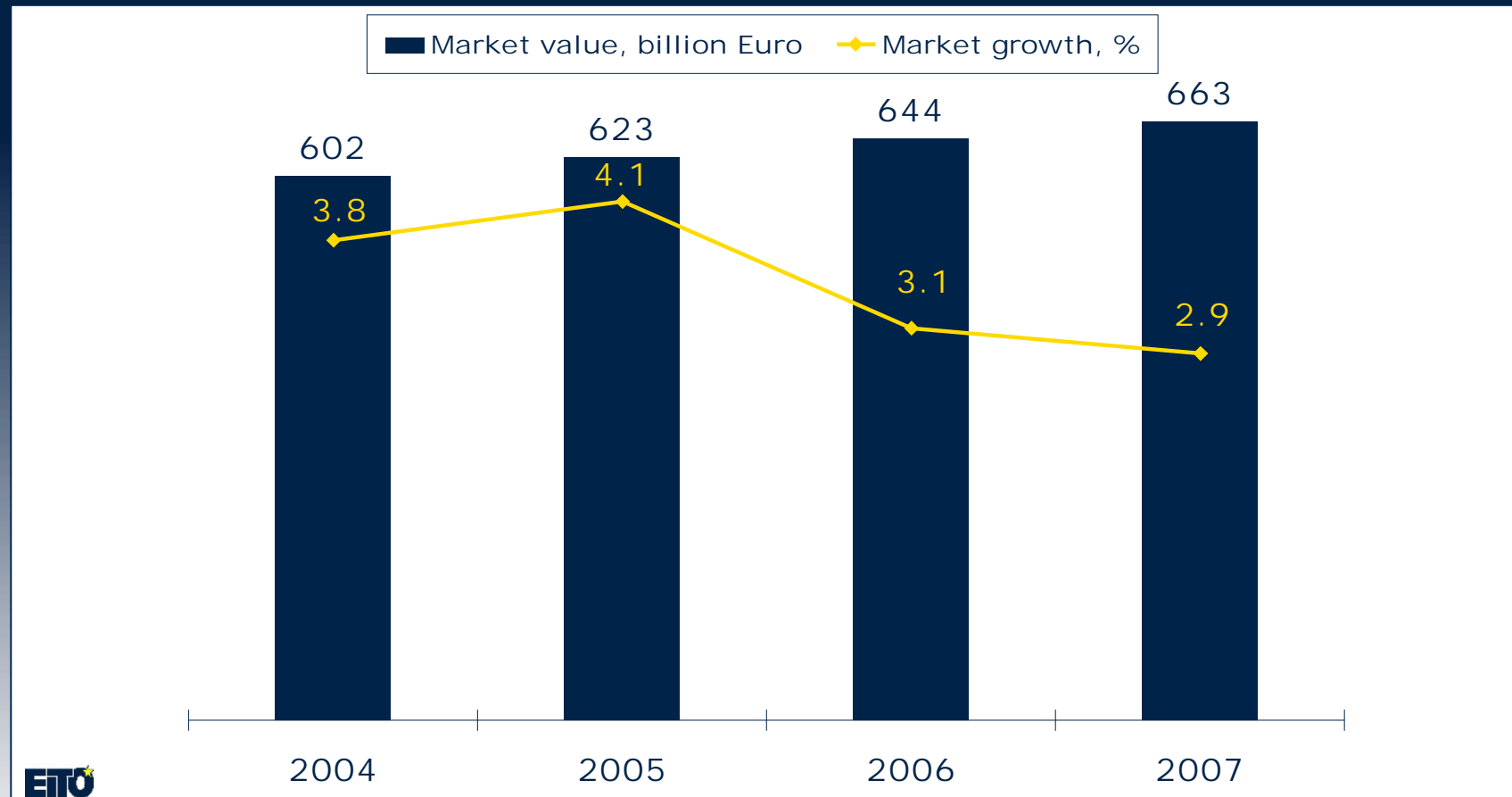


European Information Technology Observatory 2006



October 2006
Update

EU* ICT market annual growth, 2004-2007



Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 644 billion Euro
*excl. Cyprus and Malta



EU* ICT and GDP growth in %, 2004-2007

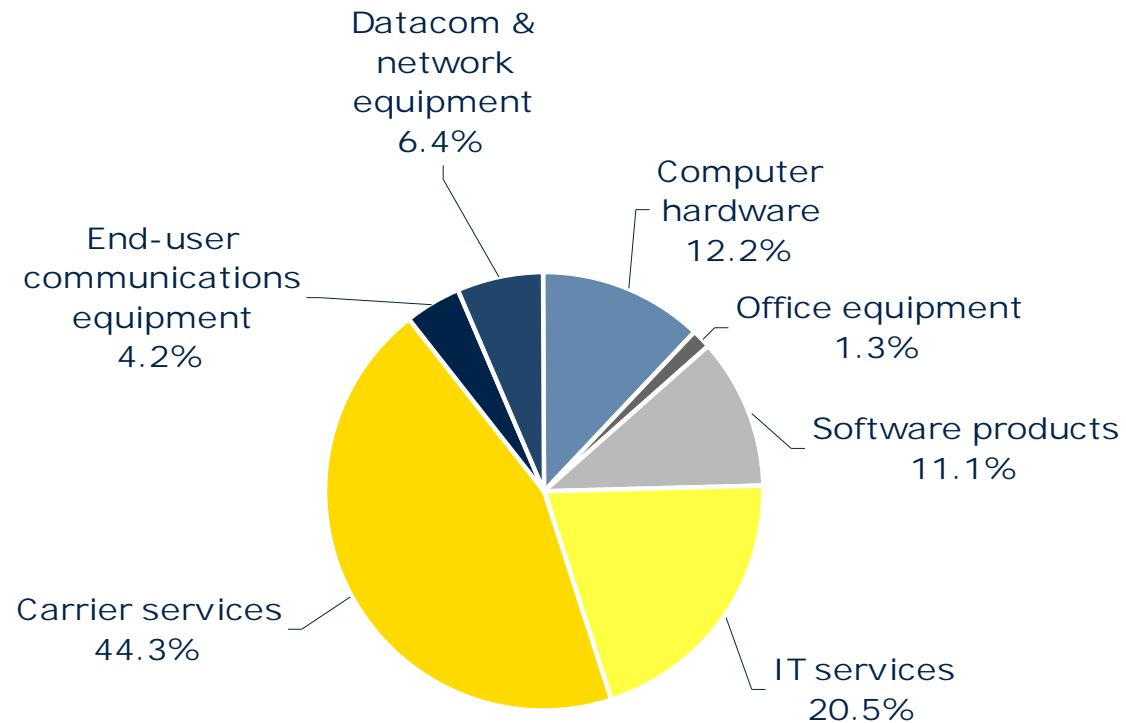


Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 644 billion Euro
*excl. Cyprus and Malta



EU* ICT market structure, 2006

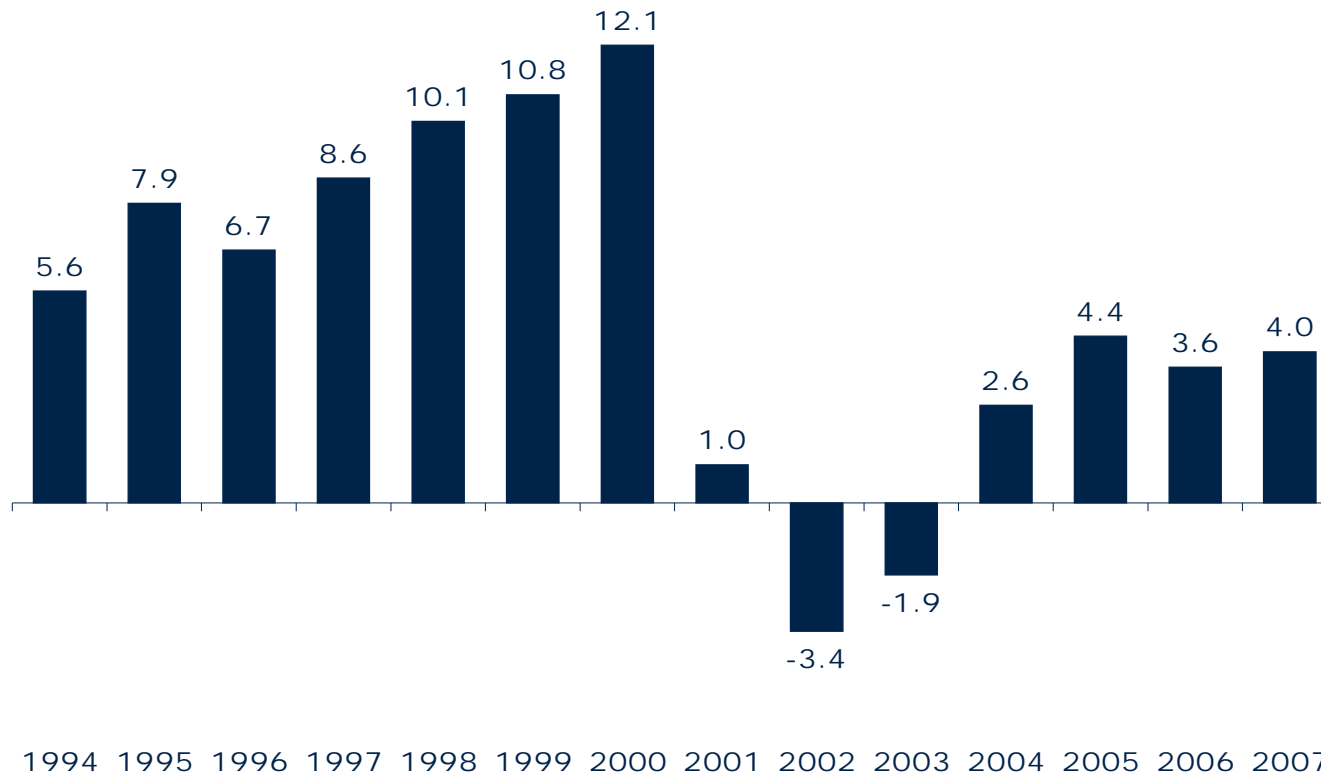


Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 644 billion Euro
*excl. Cyprus and Malta



Western European* IT market annual growth in % , 1994-2007

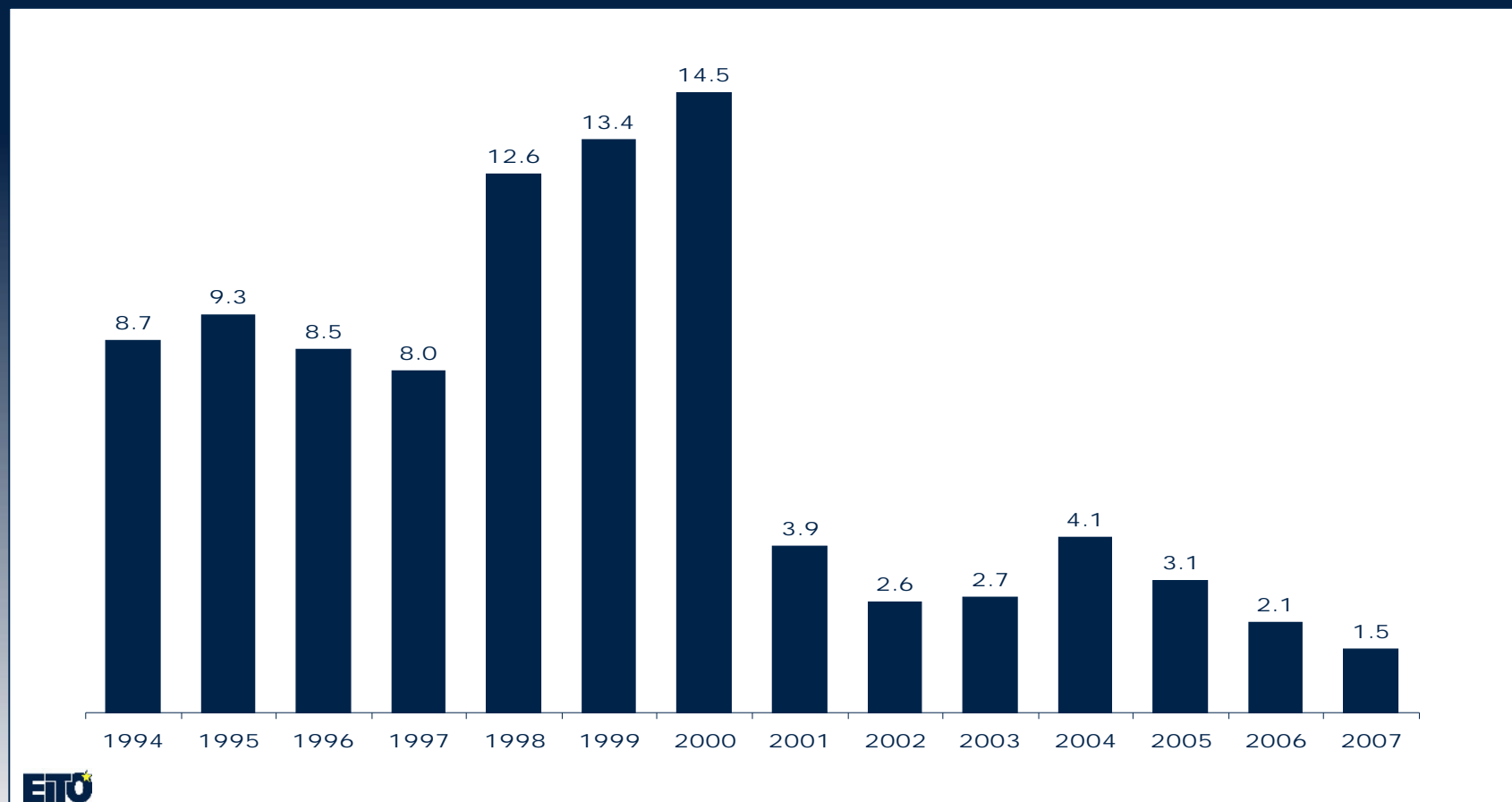


Source: EITO Update 2006 in co-operation with IDC
*includes EU 15 plus Norway and Switzerland

Market value 2006: 305 billion Euro



Western European* TLC market annual growth in % , 1994-2007

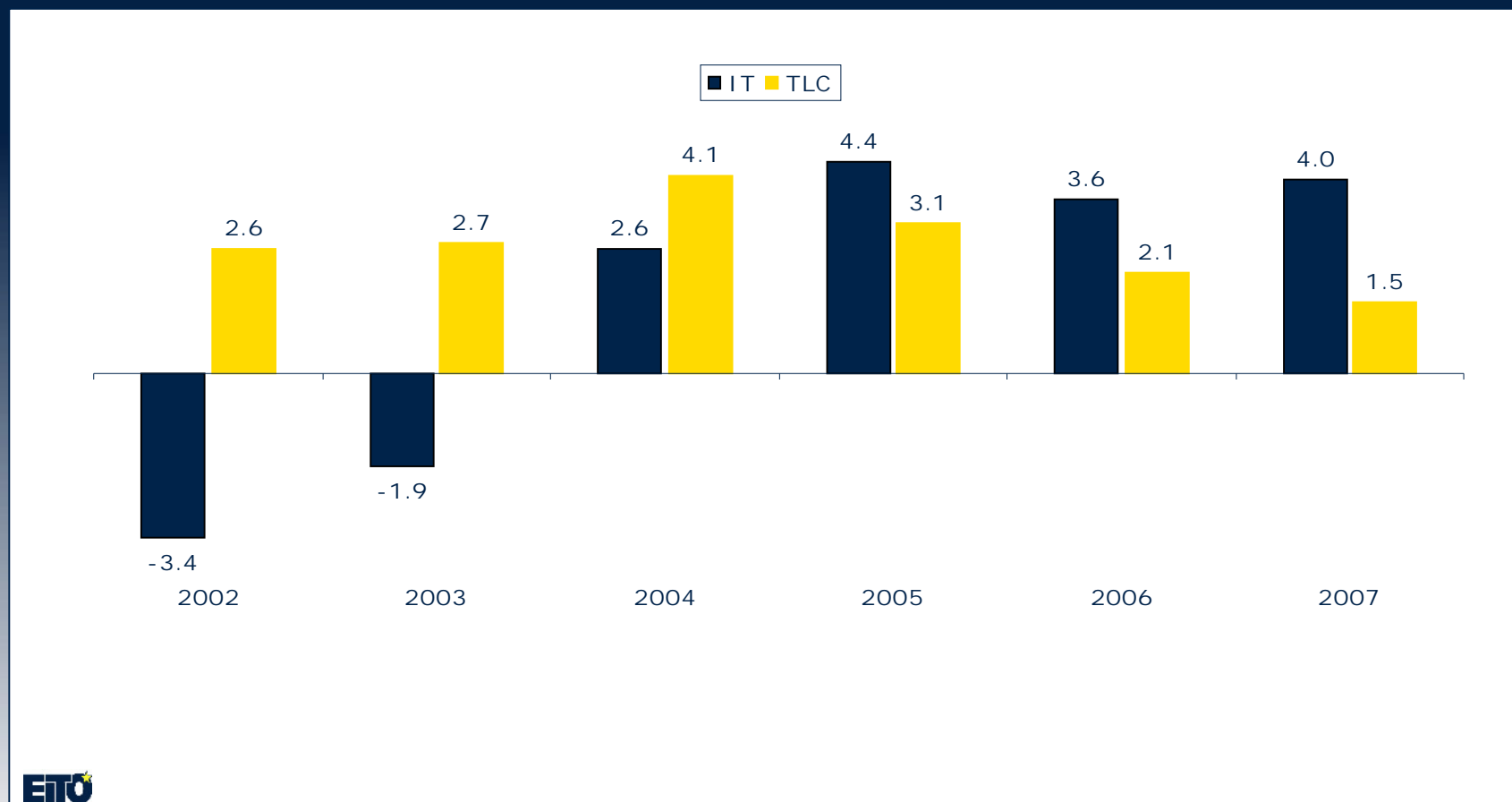


Source: EITO Update 2006 in co-operation with IDC
*includes EU 15 plus Norway and Switzerland

Market value 2006: 330 billion Euro



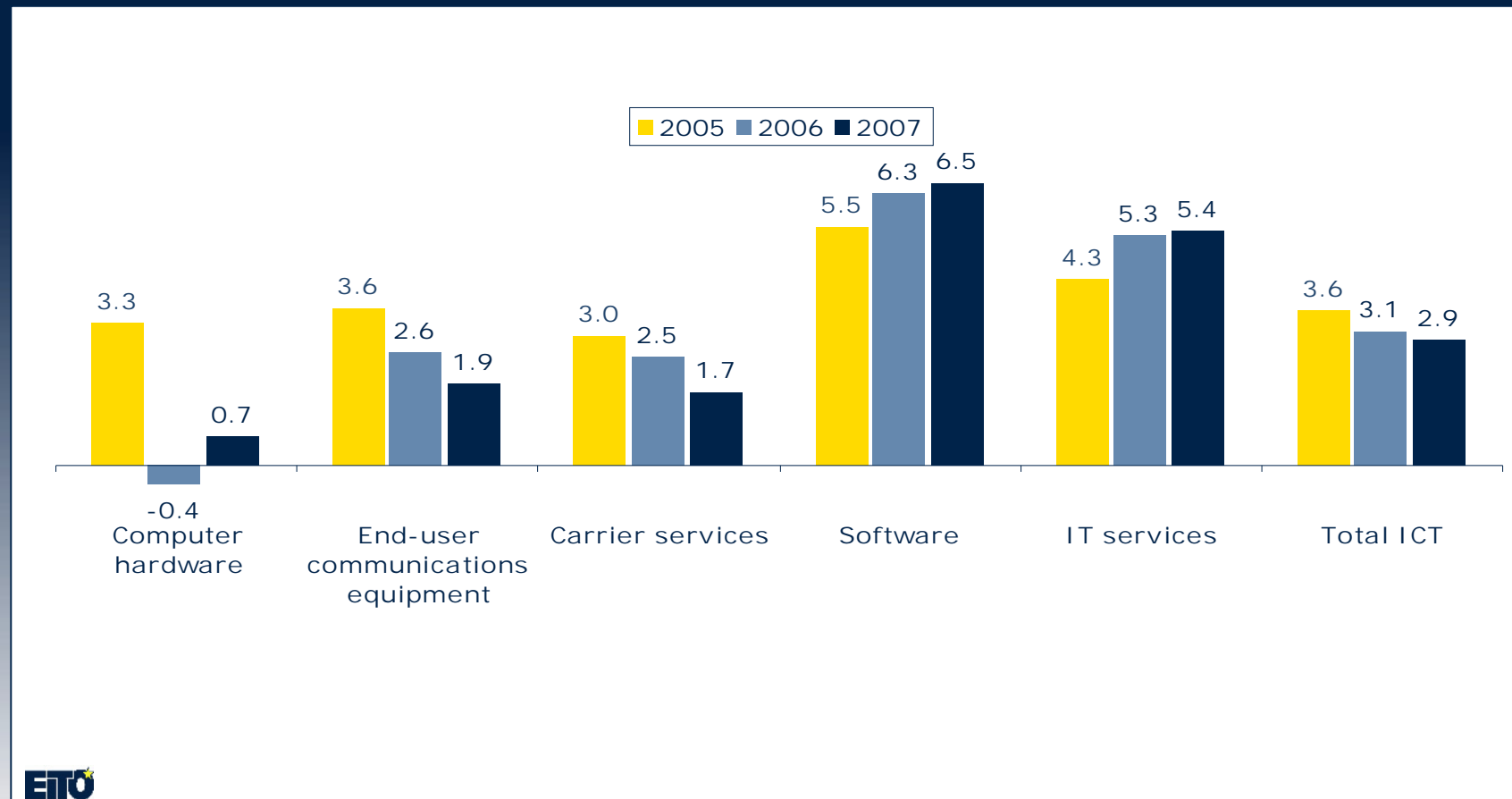
Western European* IT and TLC markets annual growth in % , 2002-2007



Source: EITO Update 2006 in co-operation with IDC ICT market value 2006: 642 billion Euro
*includes EU 15 plus Norway and Switzerland



EU* ICT market growth by segment in % , 2005-2007



Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 644 billion Euro
*excl. Cyprus and Malta



EU* ICT market value growth by product segment in % , 2004-2007

	2004/ 2003	2005/ 2004	2006/ 2005	2007/ 2006
Server systems	1.4	-0.3	-0.3	0.5
PCs	2.1	4.2	-1.2	0.1
Printers and MFPs	2.1	6.3	2.7	3.1
Other Computer hardware	4.7	5.5	-0.5	1.5
Copiers	-2.3	2.2	1.4	1.6
Other office equipment	0.0	1.3	1.0	0.7
Mobile telephone sets	5.3	4.3	4.1	2.9
Other end-user communications equipment	0.3	-1.2	-1.3	-1.0
PBX, key systems, transmission and circuit switching equipment	-3.2	0.0	0.0	0.5
Cellular mobile radio infrastructure	14.6	5.8	2.9	3.5

	2004/ 2003	2005/ 2004	2006/ 2005	2007/ 2006
Packet switching and routing equipment	3.6	0.4	1.2	1.1
Other datacom and network equipment	1.9	3.8	4.5	3.1
System software	5.3	6.8	6.6	6.8
Application software	3.4	5.4	5.9	6.1
IT services	3.6	5.3	5.3	5.4
Fixed voice telephone services	-1.5	-1.8	-4.3	-4.3
Fixed data services	9.5	10.2	10.6	7.8
Mobile telephone services	7.4	5.3	3.8	2.8
CaTV services	5.6	2.9	1.7	1.5
Total ICT market	3.8	4.1	3.1	2.9



Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 644 billion Euro
*excl. Cyprus and Malta

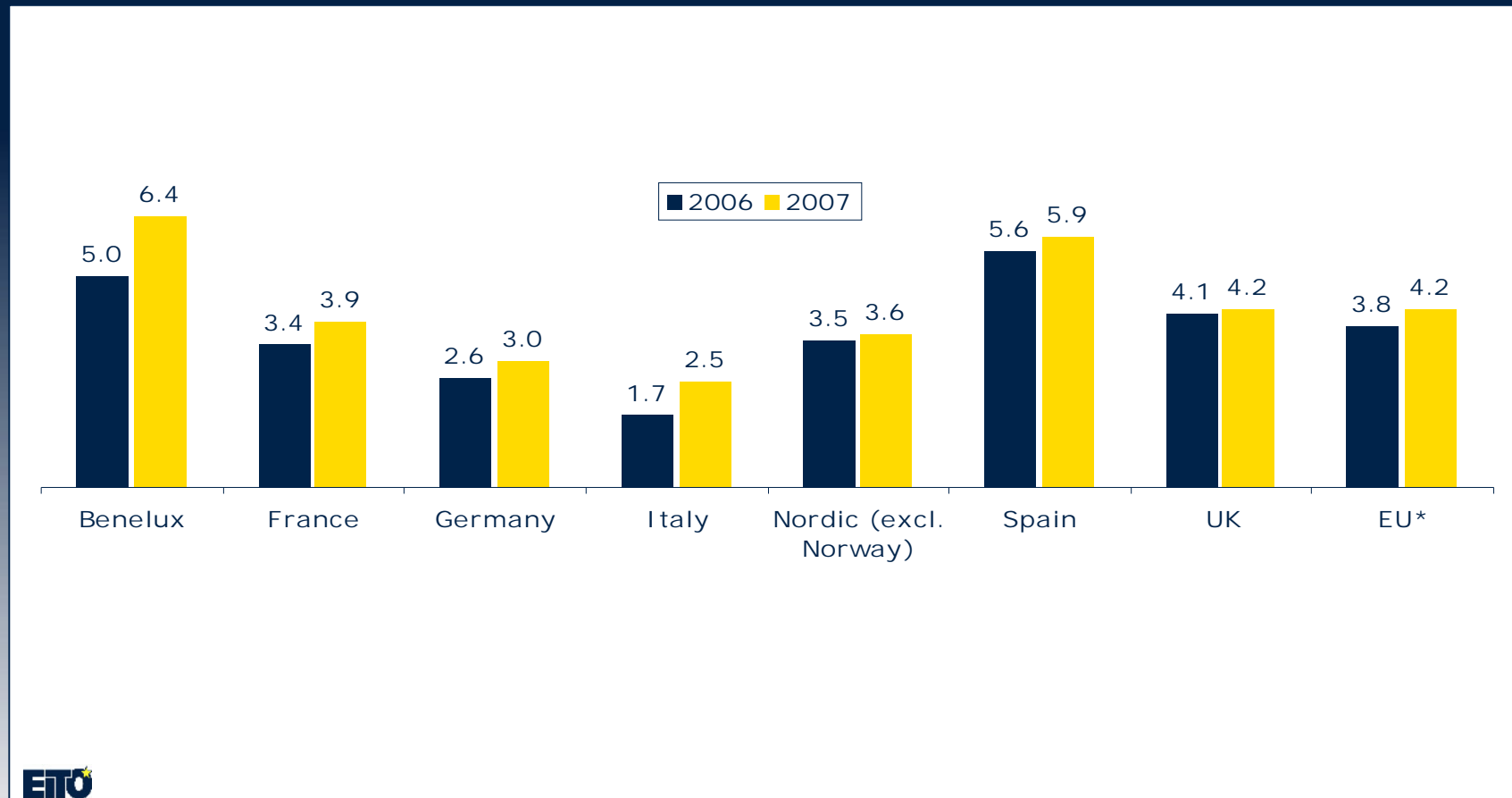


Key factors and trends for IT in Europe

1. Security and availability
2. Outsourcing
3. Verticalisation of solutions
4. Open source – Web 2.0 applications
5. Software enabling improved business processes and collaboration
6. From basic software architecture to software-as-a-service
7. IT services increasingly packed as software
8. Real-time monitoring
9. Pervasive computing
10. Mobility



EU* IT market growth by main countries in % , 2006-2007

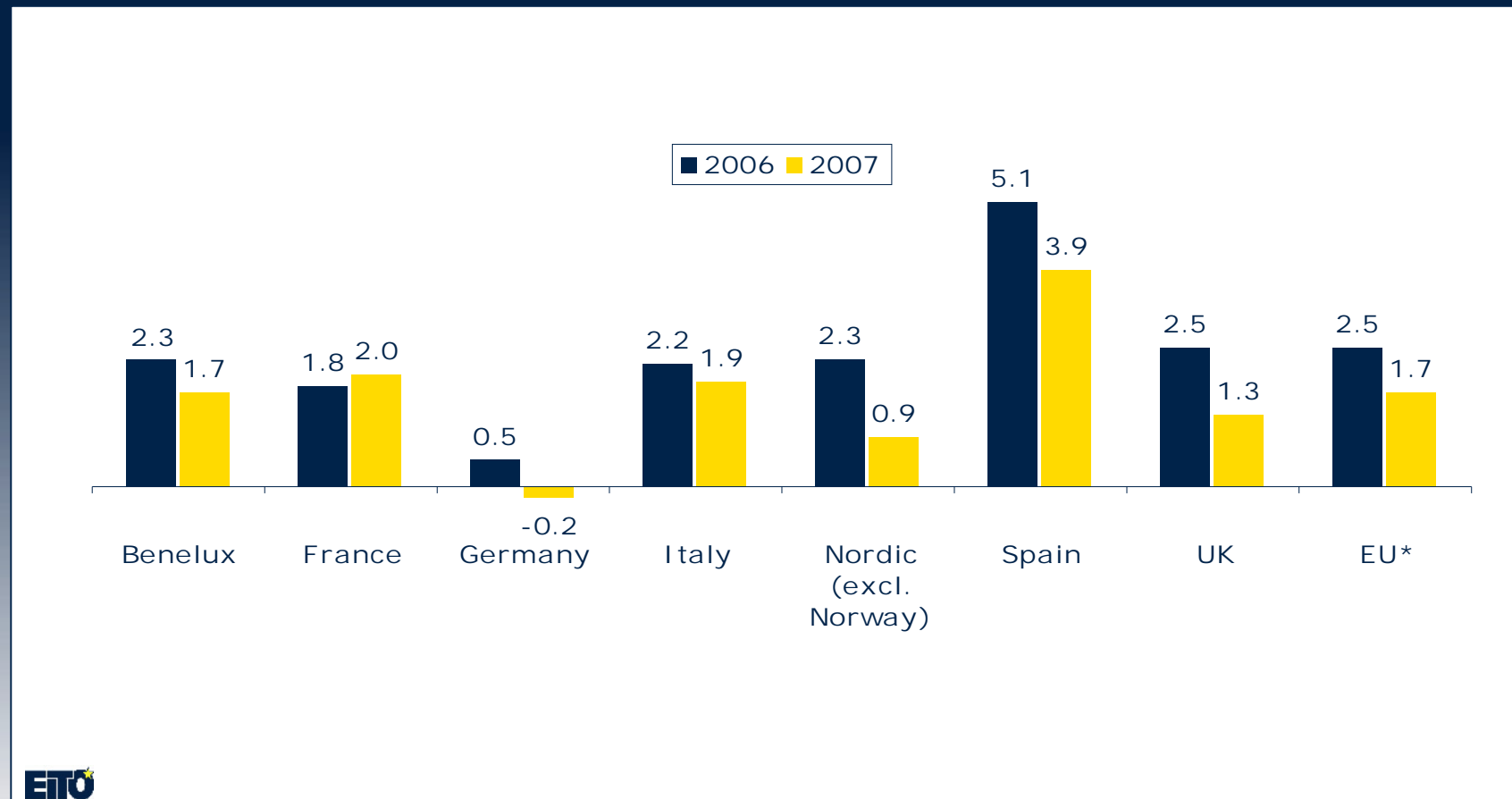


Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 305 billion Euro
*excl. Cyprus and Malta



EU* TLC market growth by main countries in %, 2006-2007

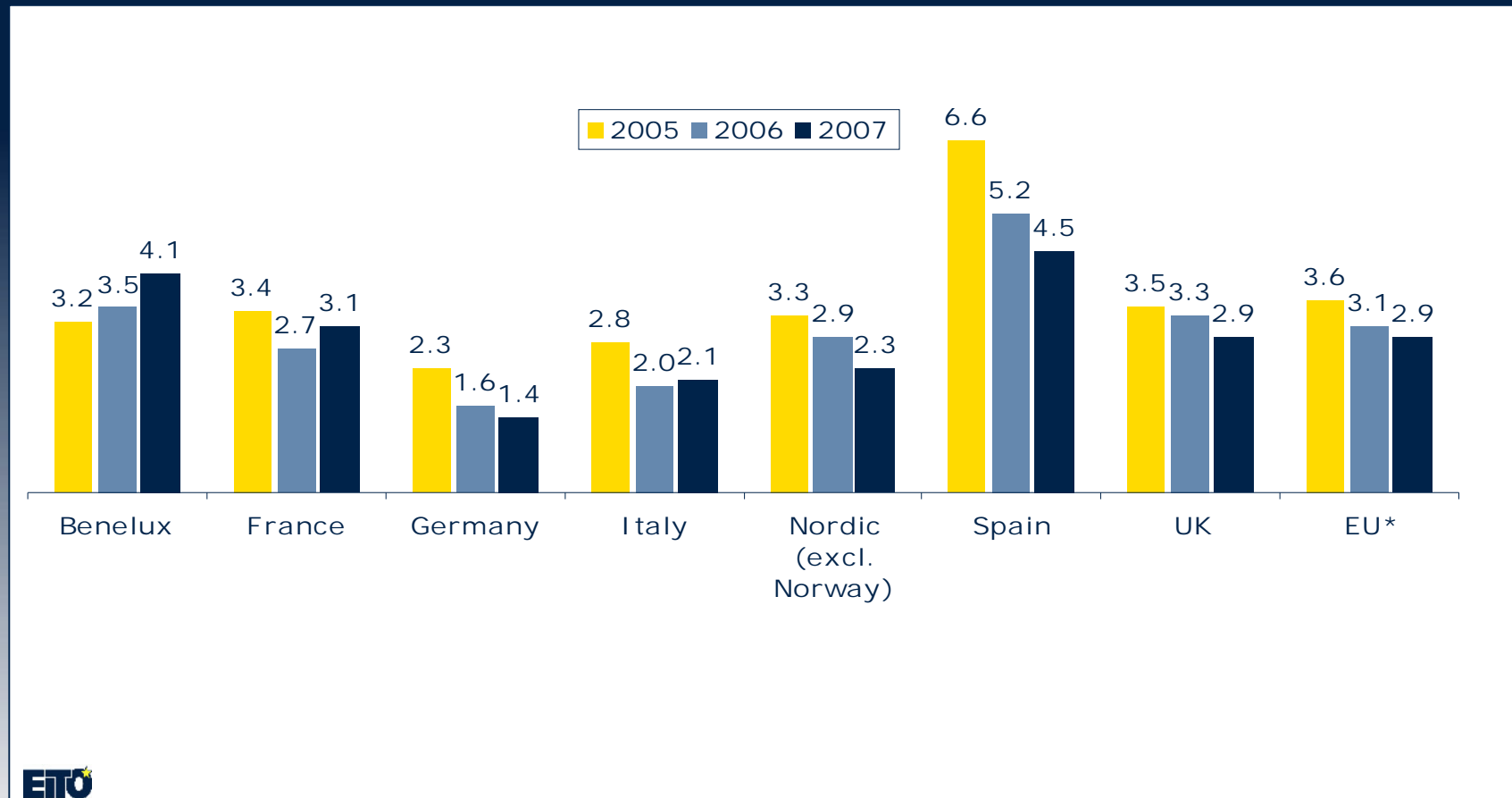


Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 339 billion Euro
*excl. Cyprus and Malta



EU* ICT market growth by main countries, 2006-2007, in %



Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 644 billion Euro
*excl. Cyprus and Malta



EU* IT market growth by country, 2006-2007, in % (detailed)

	2006	2007
Slovakia	11.7	10.4
Czech Rep.	10.1	9.6
Latvia	9.8	9.5
Lithuania	11.8	9.4
Poland	12.1	9.1
Estonia	6.-	8.2
Hungary	6.9	7.5
Netherlands	5.5	6.7
Greece	5,3	6.2
Belgium	4.-	6.1
Spain	5.6	5.9
Austria	6,-	5.9
Ireland	8.1	5.4
Switzerland	3.7	4.7
Portugal	2.7	4.5
United Kingdom	4.1	4.2
European Union	3.8	4.2
Finland	4.-	4.1
Slovenia	6.1	4.-
France	3.4	3.9
Denmark	4.1	3.6
Norway	4.-	3.3
Sweden	2.8	3.3
Germany	2.6	3,-
Italy	1.7	2,5
EU new members	10,5	9.1
EU 15	2.8	3.2



Source: EITO Update 2006 in co-operation with IDC



EU* TLC market growth by country, 2006-2007, in % (detailed)

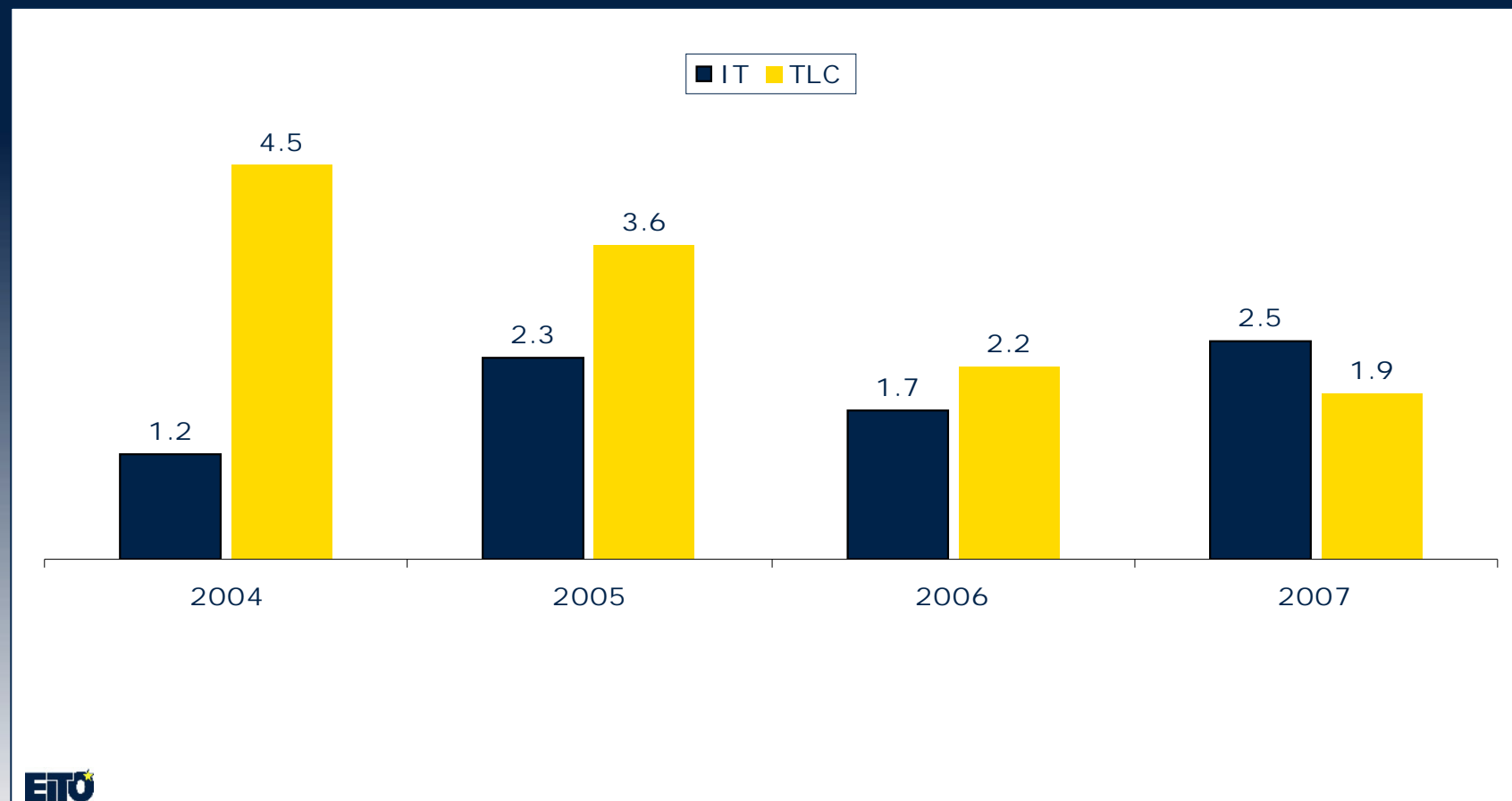
	2006	2007
Czech Rep.	7.5	7.5
Latvia	9.6	7.3
Poland	8.6	6.2
Slovenia	5.1	6.1
Slovakia	5.9	5.8
Hungary	4.7	4.3
Estonia	8.3	4.1
Spain	5.1	3.9
Lithuania	8.6	3.1
Greece	2,-	2.1
France	1.8	2,-
Portugal	2.1	2,-
Italy	2.2	1.9
Belgium	1,-	1.9
Austria	2,-	1.7
Netherlands	2.2	1.7
European Union	2.5	1.7
Switzerland	1.1	1.6
United Kingdom	2.5	1.3
Norway	2.1	1.3
Ireland	1.3	1.2
Denmark	2.4	1.1
Sweden	2.5	0.9
Finland	1.7	0.7
Germany	0.5	-0.2
EU new members	7.8	6.1
EU 15	2.1	1,5



Source: EITO Update 2006 in co-operation with IDC



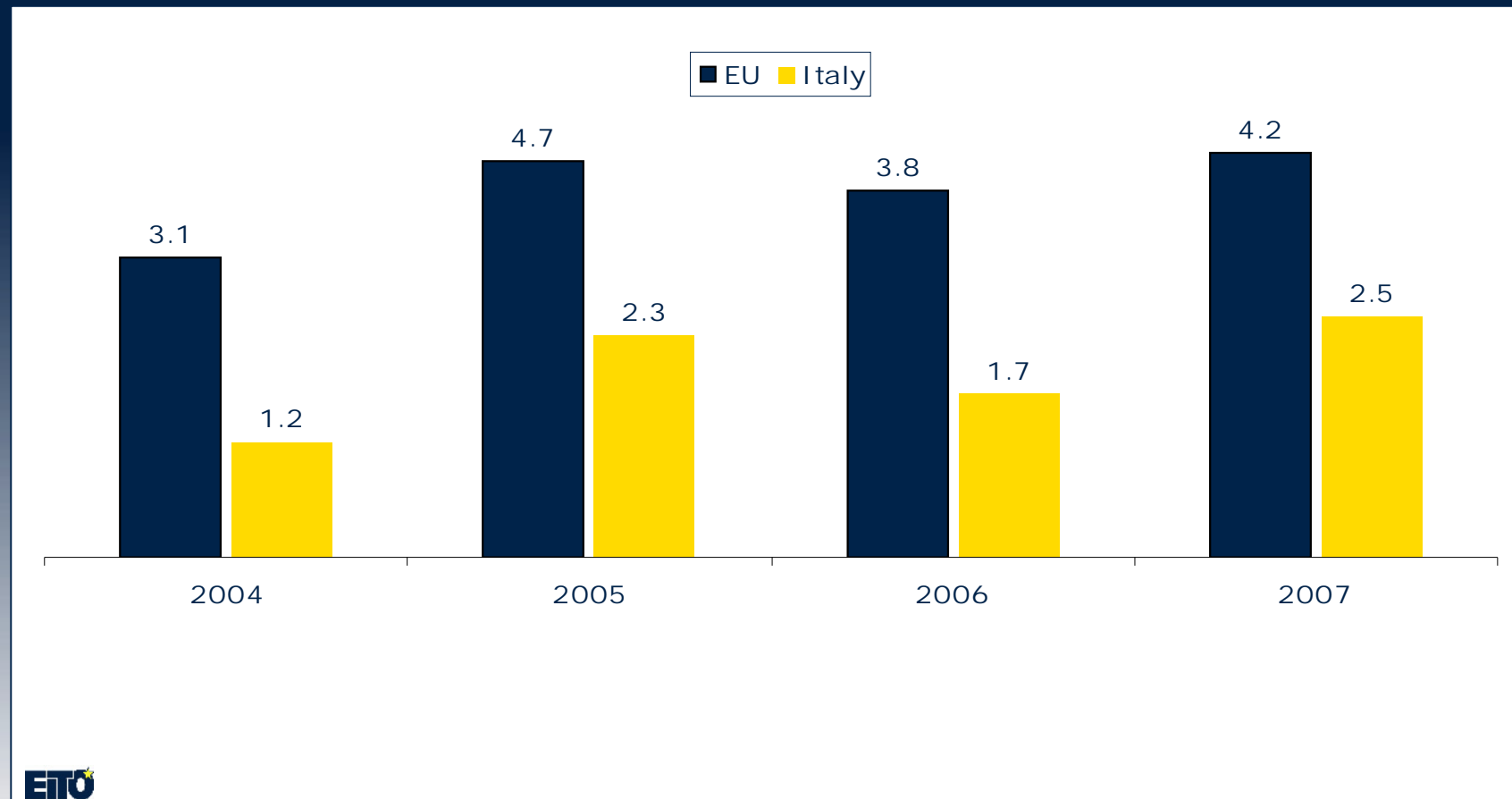
Italy IT and TLC market annual growth in %, 2004-2007



Source: EITO Update 2006 in co-operation with IDC ICT market value 2006: 70.5 billion Euro



EU* and Italy IT market growth in %, 2004-2007

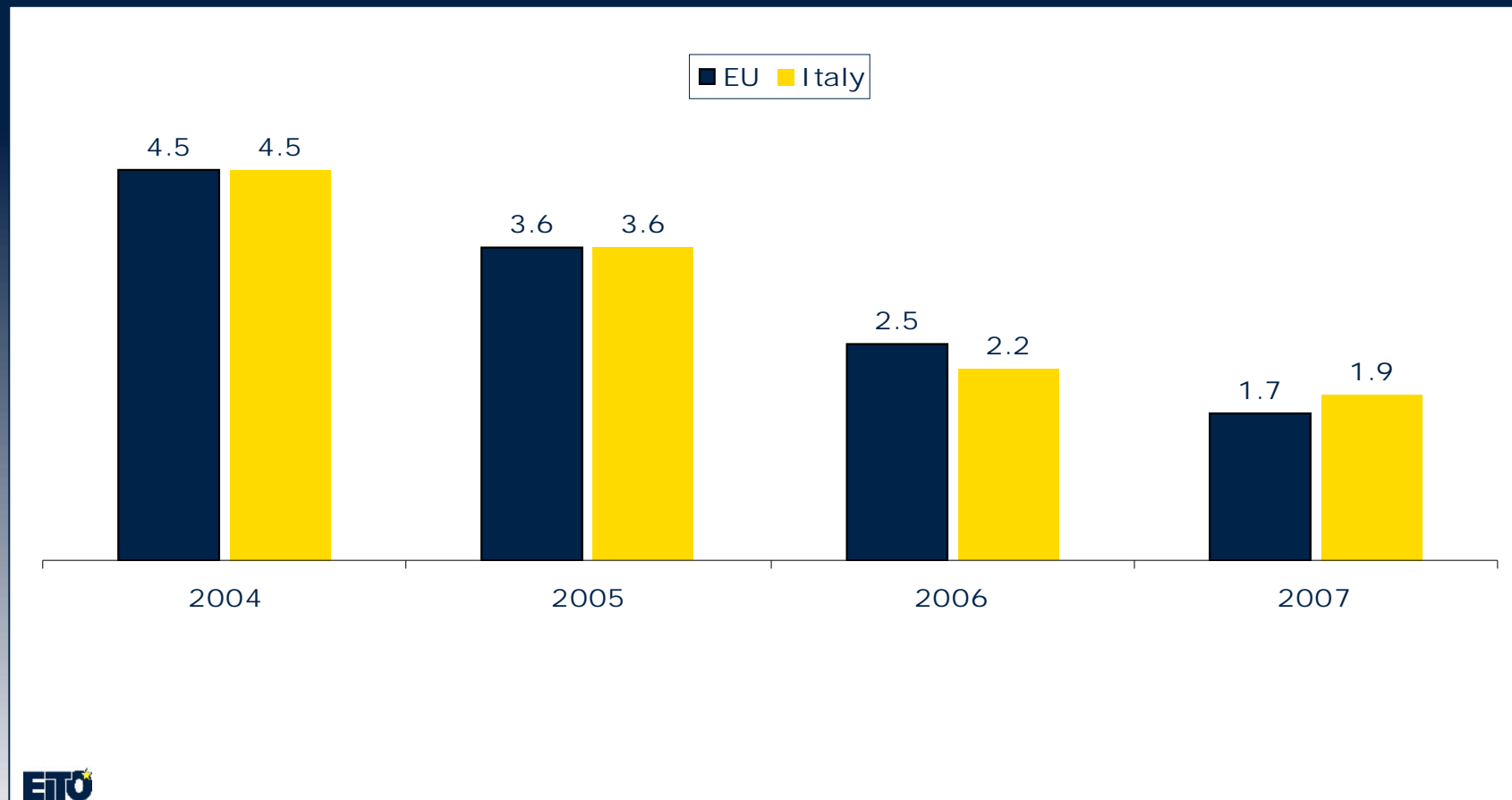


Source: EITO Update 2006 in co-operation with IDC

EU market value 2006: 305 billion Euro
*excl. Cyprus and Malta



EU* and Italy TLC market growth in % , 2004-2007

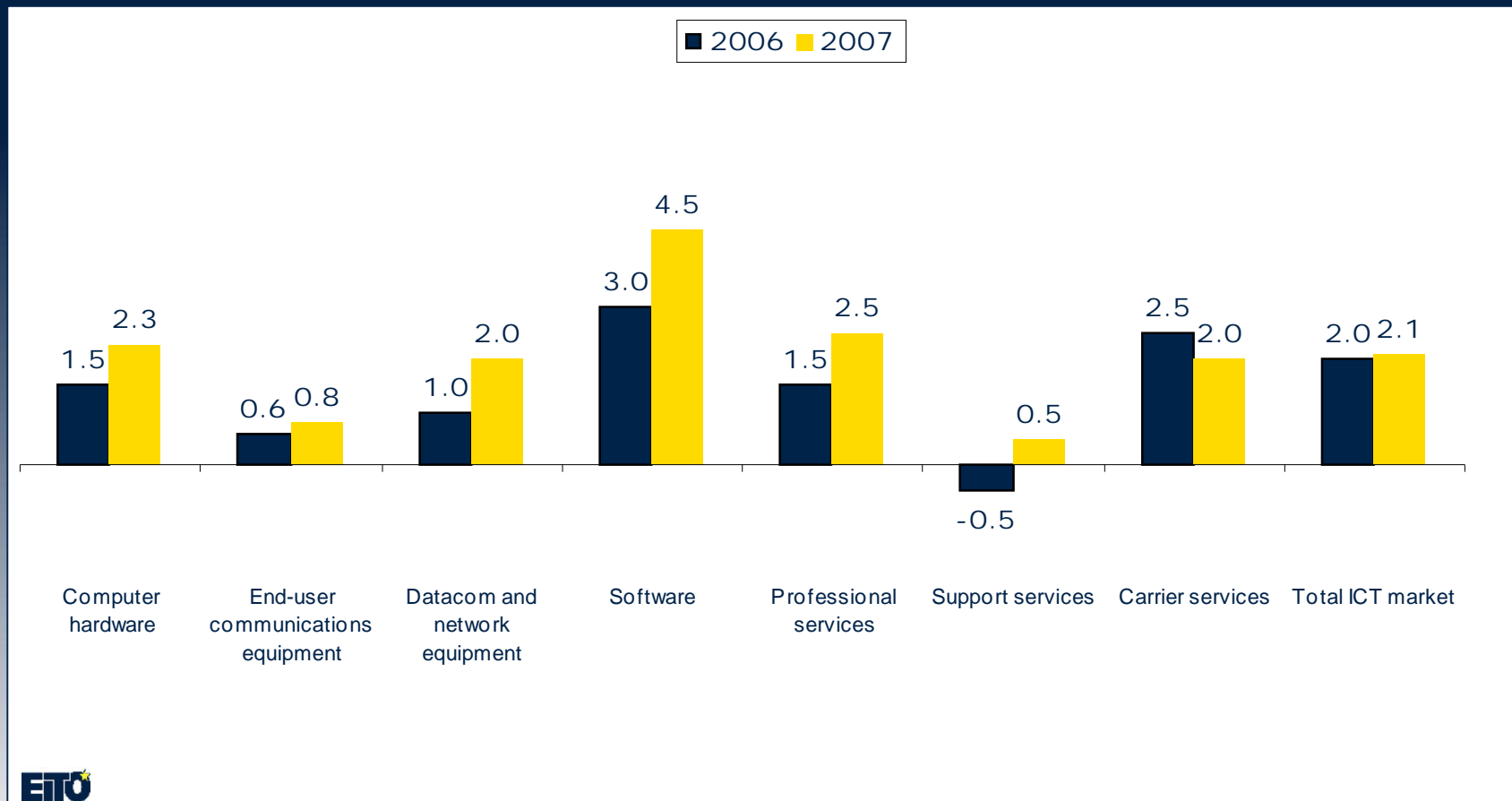


Source: EITO Update 2006 in co-operation with IDC

EU market value 2006: 339 billion Euro
*excl. Cyprus and Malta



Italy ICT market value growth by product segment in % , 2006-2007



Source: EITO Update 2006 in co-operation with IDC

Market value 2006: 70.5 billion Euro

