



IT Services Executive Summary, 2008

Analyze the Future

IDC CEMA's IT Services Coverage



Executive Summary – Slovakia



In 2008, the IT services market in Slovakia totaled \$626.85 million, representing a year-on-year growth of 30.4% in U.S. dollar terms. Measured in local currency, the market expanded by 12.9% compared to the previous year.

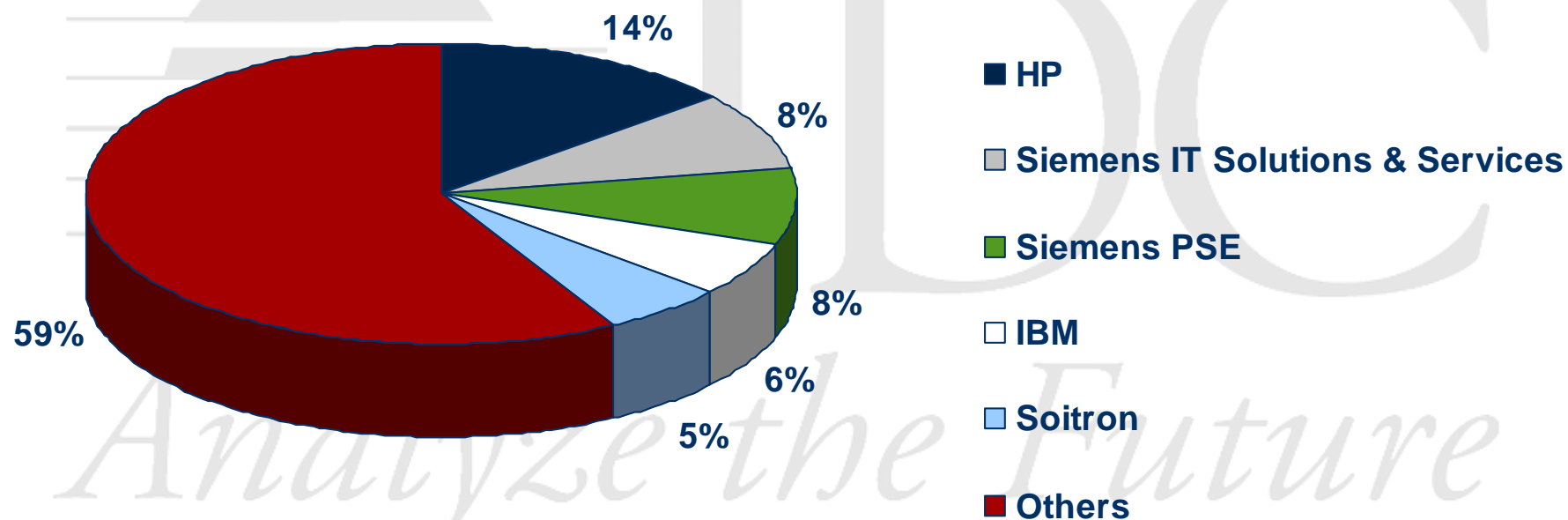
HP was the leading IT services provider in Slovakia in 2008 based on revenue of \$118.09 million and 13.9% share. Siemens IT Solutions and Services placed second with \$71.12 million last year for 8.4% share of the market. Siemens Program and System Engineering ranked third with \$68.94 million and 8.1% market share in 2008. IBM and Soitron rounded out the top five IT services providers in the country last year with 6.0% and 5.5% market shares, respectively.

In 2008, the total IT services market in Slovakia was valued at \$626.85 million, representing a year-on-year growth of 30.4% in U.S. dollar terms. The systems integration category accounted for the largest share (19.9%) of IT services revenue last year, followed by applications consulting and customization (19.6%) and custom application development (15.5%). The combined outsourcing category comprised 7.0% of the IT services market in Slovakia last year.

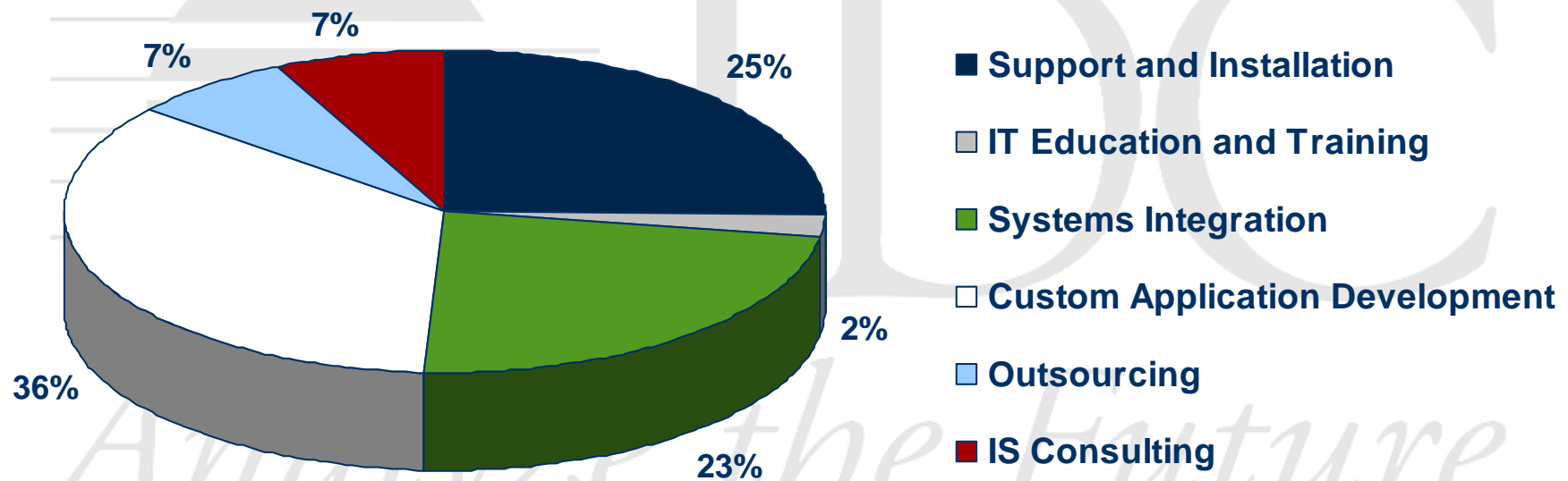
In 2008, combined finance (banking, insurance, and financial services) was the largest vertical market in Slovakia, with \$166.56 million in services-related spending for 26.6% market share. The combined government vertical placed second, with 23.1% share based on services expenditure of \$144.88 million. Combined manufacturing entities undertook IT services investment of \$77.00 million in 2008 to rank as the third-largest vertical market, with 12.3% market share. The fourth-largest vertical was utilities, which accounted for 11.8% (\$74.24 million) of total IT services spending in the country.

IDC projects spending on IT services in Slovakia to increase at a CAGR of 4.4% across the five-year forecast period. Expenditure on IT services is forecast to total \$775.91 million in 2013.

IT Services Competitive Positioning – Slovakia

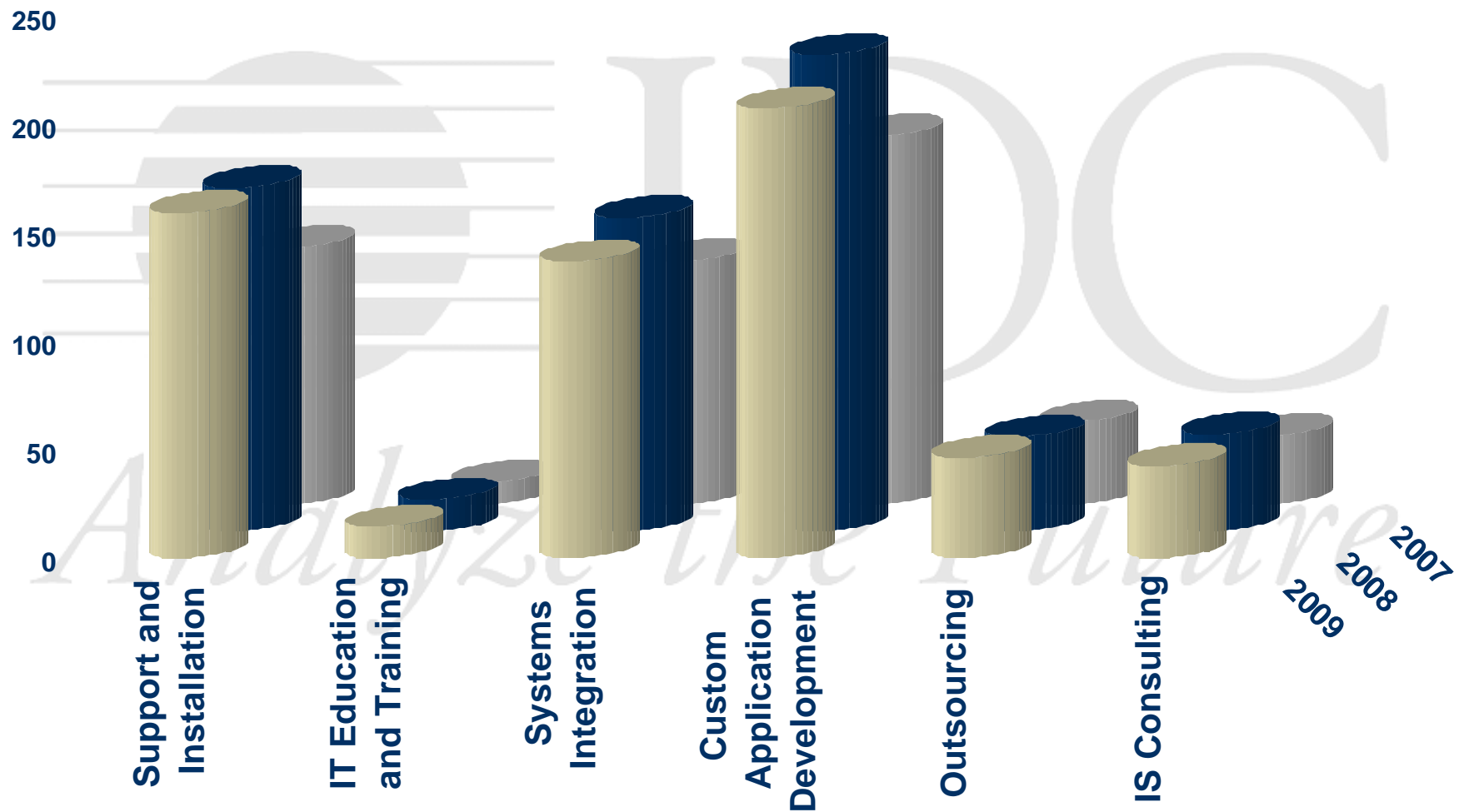


IT Services Spending (USD M) by Engagement Type – Slovakia

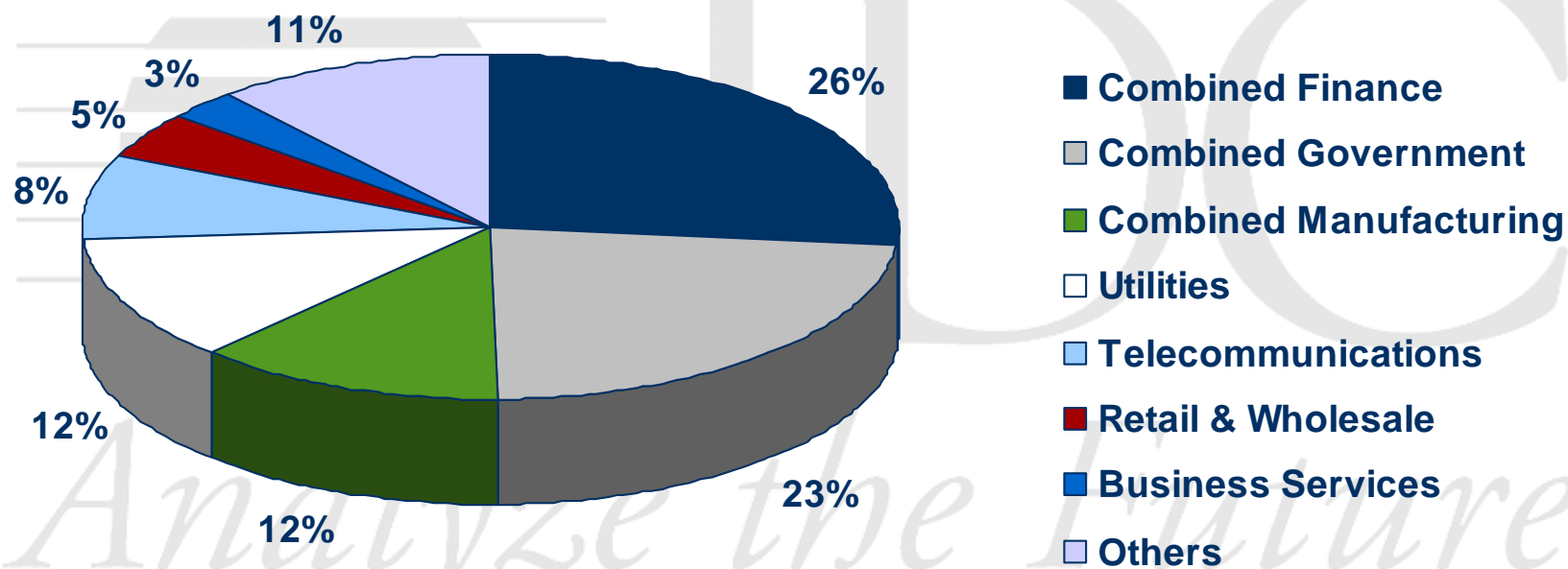


Total = \$626.85 M

IT Services Spending by Engagement Type (USD M) - Slovakia

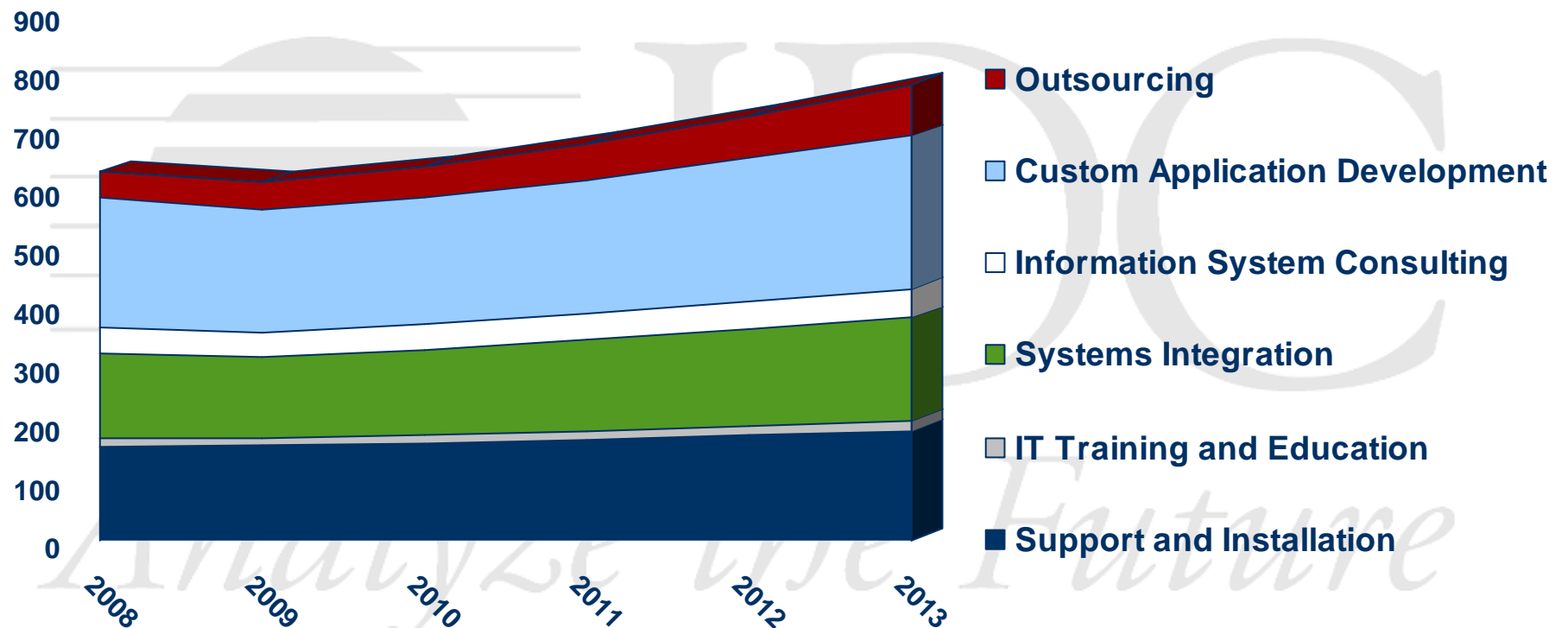


IT Services Spending (USD M) by Vertical Market - Slovakia



Total = \$ 626.85 M

Forecast and Analysis of IT Services Spending (USD M) by IDC Engagement Type in Slovakia, 2008-2013



CAGR = 4.4%

Learn More about IDC's Services - Products and Services FY08 Portfolio



IT Services

Austria
Baltic States
Bulgaria
Croatia
Czech Republic
Greece
Hungary
Poland
Romania
Russia
Slovakia
Southeast Europe (SLO, RO, BU, FRY, SER, MON Other)
Slovenia
Ukraine

Egypt
Israel
Other Gulf States
Morocco
Saudi Arabia
South Africa
Turkey
UAE

Solutions

Czech Republic
Greece
Hungary
Poland
Russia

Gulf States (covering KSA, UAE, OGCC)

Business Services

Central Europe (CZ, PO, HU, SK) Business Services 2008-2012 Forecast and 2007 Analysis

Sourcing Strategies

Competitive Analysis of Central European Countries
Competitive Analysis of Russia and the Baltic States
Competitive Analysis of Southeastern European Countries
Competitive Profiles of Central and Eastern European Vendors Providing Offshore Services

Trackers and Forecasters - CEE

Semi-annual IT Services Forecast
Semi-annual IT Services Vendor Tracker

IT Services Contracts

Central and Eastern Europe, Middle East and Africa

Custom Consulting

Why IDC?

- IDC is the only international IT market research and consulting firm with research facilities throughout the Central and Eastern Europe, Middle East and Africa region (CEMA), as well as Research Centers devoted exclusively to tracking the fast evolving IT markets of this region (Prague, Czech Republic – CEE; Dubai, UAE - MEA).
- IDC has over fifteen years of experience in tracking and documenting the market dynamics of a variety of technologies in the CEMA markets. It retains a network of offices in Bulgaria, Czech Republic, Poland, Hungary, Russia, Romania, Ukraine, Kazakhstan, Croatia, Slovenia, Serbia, the UAE, Turkey, Israel, Morocco, Nigeria, Kenya, and South Africa.
- IDC is experienced in undertaking primary research projects of this nature on a local basis. Each year, IDC undertakes multiple custom research and consulting engagements providing our clients with the strategic and tactical intelligence to improve their businesses.
- IDC, through its work on the quarterly and annual IT market surveys and its ongoing efforts in market research, contacts more high technology organizations than any other market research firm in the region. Consequently, IDC has compiled a substantial list of local and regional contacts and has considerable expertise with in-depth interview and survey methodologies for both vendor and user research.
- IDC also retains an extensive list of contacts in the large enterprise user communities for its well-known and highly regarded CEMA IT conferences and roadshows.
- IDC applies strict project management and reporting methods to all projects of this nature, to ensure that projects are delivered on time, within budget and to the expected quality standard.
- In order to add the best possible value to the project design, analysis and interpretation of the results, IDC will assign to this project a highly skilled team who can analyze the results of this study in the context of the broader market environment.

Local Presence = Accuracy and Insight

Central and Eastern Europe

- Albania
- Austria
- Belarus
- Bosnia & Herzegovina
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Estonia
- Greece
- Hungary
- Kazakhstan
- Latvia
- Lithuania
- Macedonia
- Montenegro
- Poland
- Romania
- Russia
- Serbia
- Slovakia**
- Slovenia
- Tajikistan
- Turkmenistan
- Ukraine
- Uzbekistan
- Rest of CEE



Middle East and Africa

- Turkey
- UAE
- Saudi Arabia
- Kuwait
- Qatar
- Oman
- Bahrain
- Lebanon
- Syria
- Iran
- Jordan
- Israel
- Rest of ME
- Egypt
- Morocco
- Algeria
- Tunisia
- Libya
- Ghana
- Kenya
- Uganda
- Nigeria
- Namibia
- Ivory Coast
- Ethiopia
- Tanzania
- Botswana
- South Africa
- Rest of Africa

IDC CEMA

- 120+ analysts in 20 key countries in CEE and MEA
- Regional headquarters located in Prague, Czech Republic
 - Research coverage of nearly 50 countries
- Research centers for key sub-regions: Core Central Europe, Russia/CIS, Adriatics, SEE, Middle East and Africa

Thank You



Zuzana Kucerova

Tel: + 420 221 423 138

zkucerova@idc.com

Research Analyst

IT Services

IDC CEMA

Malé náměstí 13

110 00 Praha 1

Czech Republic

Fax: + 420 221 423 150

www.idc-cema.com

www.idc.com



IDC CEMA

Malé náměstí 13

110 00 Praha 1

Czech Republic

Fax: + 420 221 423 150

www.idc-cema.com

www.idc.com

Curtis Robinson

Tel: + 420 221 423 140

crobinson@idc.com

Senior Research Analyst

IT Services