

IDC CEMA ICT MARKETS ALERT – OCTOBER 2008

Welcome to IDC CEMA's IT Market Alerts. This edition includes details of recent IDC CEMA studies and general news and information on upcoming IDC CEMA events. If you would like to be removed from our mailing list, please reply to thinova@idc.com with the word "remove" in the subject line.

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1. COMPUTER SYSTEMS MARKETS

1.1 PC shipments recorded a robust 27% increase in EMEA in the 3Q08 and notebooks continued to drive overall market growth at over 52% YoY as consumer demand showed no sign of slowing down in Europe. IDC estimates over 2 M units shipped. Acer took # 1 spot in EMEA while Asus stepped further up to 4th place in the overall ranking. **HP** displayed solid growth at over 20% overall in EMEA. **Dell** maintained positive growth and a strong 3rd place in the overall EMEA ranking although share declined slightly. **Asus** stepped further up to 4th place shipping over 2 M units. **Toshiba** continued to deliver solid performance with growth reaching over 40% across EMEA.

Top 5 Vendors (EMEA) 3Q08 PC Shipments (000 Units)

Vendor	3Q07 Shipments	3Q08 Shipment	3Q07 Share	3Q08 Share	3Q08/3Q07 Growth
Acer (1)	3,113	5,920	14.2%	21.3%	90.2%
HP	4,291	5,203	19.6%	18.7%	21.3%
Dell	2,351	2,659	10.7%	9.5%	13.1%
Asus	805	2,060	3.7%	7.4%	156.0%
Toshiba	1,137	1,628	5.2%	5.8%	43.2%
Others	10,240	10,387	46.7%	37.3%	1.4%
Total	21,936	27,857	100.0%	100.0%	27.0%
<i>Acer/Gateway/ Packard Bell (2)</i>	3,621	5,920	16.5%	21.3%	63.5%

In the same time worldwide PC shipments struggled to meet expectations in the 3Q08 and were up 15.8% YoY. U.S. as expected was sluggish with performance further exacerbated by a flurry of bad economic news.

Top 5 Vendors, Worldwide PC Shipments, 3rd Quarter 2008 (Preliminary*) (Units Shipments are in thousands)

Rank	Vendor	3Q08 Shipments	Market Share	3Q07 Shipments	Market Share	3Q08/3Q07 Growth
1	HP	15,095	18.8%	13,136	19.0%	14.9%
2	Dell	11,346	14.2%	10,186	14.7%	11.4%
3	Acer	10,038	12.5%	5,388	7.8%	86.3%
4	Lenovo	5,952	7.4%	5,528	8.0%	7.7%
5	Toshiba	3,657	4.6%	2,948	4.3%	24.0%
	Others	34,055	42.5%	31,999	46.3%	6.4%
	All Vendors	80,143	100.0%	69,185	100.0%	15.8%
3	Acer (Merged)	10,038	12.5%	6,411	9.3%	56.6%

1.2 PC market in Egypt continued its healthy growth, recording YoY expansion of 27.3% in volume and 36.5% in value to 409,094 units worth \$429.23 M. The growth stemmed mainly from a large # of IT infrastructure implementations and upgrade projects in the country's leading economic sectors: government, telecommunications, and oil and gas. HP retained 1st place in PC market vendor volume rankings garnering 19.3% of total market volume. Dell placed 2nd, FSC) placed 3rd, Acer - 4th, Lenovo IDC expects the Egyptian PC market to expand at a compound annual growth rate (CAGR) of 16.4% in volume and 12.8% in value over the 5-year forecast period, with sales rising to 875,826 units worth \$782.37 M in 2012. Further expansion is expected across the country's leading verticals (telecommunications, oil and gas, and banking) will characterize the Egyptian PC market over the forecast period. Demand for PCs will also be driven

1.3 Czech disk storage systems revenue declined by 0.9% YoY to \$112.84 M and terabyte shipments increased 55.2% YoY to 12,369.7 TB. Shipments totalled 15,145 for a YoY increase of 5.7%. External disk storage systems saw an annual decline of 1.1% in revenue for an 82.7% share of market value. Internal disk storage systems revenue benefited from positive evolution on the enterprise systems and server market, but revenue increased only marginally, at 0.1% YoY. In terms of capacity, internal storage systems recorded a YoY increase of 68.1%, and external storage systems saw 38.3% YoY growth. In shipment terms, external disk storage arrays achieved YoY growth of 42.2%, while internal disk storage systems saw only a 2.6% YoY increase. SANs accounted for the largest share of market value but declined on the back of strong growth in 2006. SAN systems captured a 63.8% share. NAS recorded YoY growth of 12.8% in revenue and garnered a 6.3% share of market revenue. DAS saw a YoY increase of 5.7% in revenue. Some businesses began to implement Internet Small Computer System Interface (iSCSI) installation environments, and so sales represented 0.4% share of market revenue. In 2007, the largest share of disk storage systems was shipped with Windows OS, which captured 60.2% of market revenue. The Unix OS saw a YoY decline of 3.7% due to a lower share of high-end shipments in 2007. Unix's market was valued at \$28.82 M for a 25.5% share of market revenue. The Linux OS and IBM's proprietary i5/OS were the only OSs that recorded YoY increases. Linux posted a 23.5% YoY revenue increase to garner a 10.2% share of market value. IBM's i5/OS saw 365.9% YoY revenue growth. by the government's increasing focus on IT, replacement cycles, increased privatization levels, and low penetration levels within the SOHO and SMB segments.

1.4 South Africa's disk storage market grew 18.0% in value YoY in 2007 to \$252.54 M. Sales of external disk storage systems rose 17.8% YoY to \$202.23 M, making up 80.1% of total market revenue. Sales of SAN systems grew 19.5% YoY to \$151.72 M in 2007, while South Africa's internal disk storage market grew 18.8% YoY in 2007 to \$50.32 M, equating to 19.9% revenue share. In terms of capacity, internal storage systems recorded a YoY increase of 107.4%, and external storage systems saw 37.9% YoY growth. In shipment terms, external disk storage arrays achieved YoY growth of 20.9%, while internal disk storage systems saw a 28.7% YoY increase. SAN systems continued to make up the largest portion of storage spending at \$151.72 M. SAN spending in South Africa is expected to expand at a CAGR of 20.6% over the forecast period to \$387.82 M in 2012, while DAS spending will increase at a CAGR of 16.2% over the same period to \$72.62 M. IDC expects spending on external storage systems to expand at a CAGR of 21.6% over the forecast period to total \$537.90 M in 2008. Meanwhile, expenditure on internal storage systems will grow at a CAGR of 2.9% over the same period to reach \$58.04 M in 2008.

1.5 Datacenter Energy Costs in Europe has grown annually by more than 13% between 2006 and 2007. In 2007, consumed more than 16.3TWh, which is almost twice the amount of electricity needed every year to power all street lighting and traffic signals in the U.K. At a datacenter level, IDC estimates the consumption levels in Europe to have exceeded 40TWh in 2007 and this is expected to grow to more than 42TWh in 2008. At a cost of 10.71 euro cents per kWh, electricity is a large source of costs. Last year, €1.6 B was spent on powering, which translated into €4.4 B for entire datacenters. In 2012, we could face a scenario where for every euro spent on buying new servers, more than €0.80 will be needed to power the existing datacenter infrastructure

2. COMMUNICATIONS MARKETS

2.1 New Submarine Cables Help Integrate East Africa Into Global Economy with 4 different cable projects and will alleviate East Africa's dependence on expensive satellite broadband that, so far, has contributed to scarcities in communications, education, and market opportunities. Although the laying of the 1st cable by mid-2009 will immediately increase broadband availability, substantial price drops may only occur once additional cables provide competition. Currently, only a handful of sub-Saharan countries along Africa's western coast are covered by the South Atlantic 3/West Africa Submarine Cable (SAT-3/WASC), which provides, via Portugal, European connections to Senegal, the Ivory Coast, Ghana, Benin, Nigeria, Cameroon, Gabon, Angola, and South Africa. Another segment of the project, SAT-2/WASC/South Asia Far East (SAFE), connects South Africa and Mauritius with India and Malaysia. **Alcatel-Lucent**

will upgrade submarine cable's capacity with a new contract with the East Africa Submarine Cable System (EASSy) consortium to increase the cable's capacity to 1.4T bps (bits per 2nd) from 320G bps. The agreement allows Alcatel-Lucent to change the equipment design to accommodate the new capacity requirements. The design change, however, will have no effect on the cable's June 2009 delivery deadline. The EASSy network will span nearly 10,000 kilometers, linking eight countries from Sudan to South Africa. 25 licensed telecommunications operators in the Eastern and Southern African region and international carriers developed the project. Alcatel-Lucent won the contract in March 2007 to deliver the submarine cable, which is expected to compete with SEACOM and The East African Marine System (TEAMS).

2.2 Financial Crisis Hits Mobile Phone Market as 3Q08 Shipment Growth Drops To 3.2%. Mobile phone manufacturers shipped a total of 299.0 M handsets in 3Q08, up 3.2% from last year, and down -0.4% over 2Q08. The EMEA market posted mixed results, with continued downturn in Western Europe due to economic challenges but still strong growth from the converged mobile device market. In neighboring CEMA, vendors showed no sign yet of a significant slowdown. **Nokia** remained solidly in the market leadership position, with shipments greater than the next 3 vendors' total volumes combined, but not even it was immune from challenging market conditions. **Samsung** reached a new milestone during the quarter, shipping over 50 M units for the 1st time in its history. **Sony Ericsson** took 3rd place worldwide for the 1st time in its history, despite ongoing restructuring across the company and a net loss for the quarter. **Motorola** took another step to reversing its fortunes, hiring Qualcomm's Sanjay Jha to lead its Mobile Devices division this summer. **LG Electronics** slipped into the # 5 spot.

Top 5 Mobile Phone Vendors, Shipments, and Market Share, Q3 2008 (Units in Ms)

Vendor	3Q08 Unit Shipments	3Q08 Market Share	3Q07 Unit Shipments	3Q07 Market Share	3Q08/3Q07 Change
1. Nokia	117.8	39.4%	111.7	38.6%	5.5%
2. Samsung	51.8	17.3%	42.6	14.7%	21.6%
3. Sony Ericsson	25.7	8.6%	25.9	8.9%	-0.8%
4. Motorola	25.4	8.5%	37.2	12.8%	-31.7%
5. LG Electronics	23.0	7.7%	21.9	7.6%	5.0%
Others	55.3	18.5%	50.3	17.4%	9.9%
Total	299.0	100.0%	289.6	100.0%	3.2%

2.3 Advanced Telecommunications Computer Architecture (ATCA) is on track to reach \$2.65 B in 2013. In the short term, demand will be hindered as ATCA platforms are put on hold or delayed as companies develop their strategies. In the longer term, however, these mega mergers, which account for approximately 25% of overall telecommunications equipment revenues, will create increased xTCA demand as the logic of standard platforms takes hold. The NEP community is very supportive of ATCA and commercial off-the-shelf components (COTS). HP has exited the ATCA market, while IBM pushes its BladeCenter products. Linux is changing the SW makeup of network infrastructures through new devices at the control layer and network layer.

2.4 Worldwide Wireless LAN Semiconductor is expected to pass the \$4 B mark by 2012 with a CAGR of 22.8%. While PCs will remain the largest application segment for WLAN semiconductors, mobile phone applications will grow at a CAGR of 49.3% and become the 2nd-largest category for WLAN semiconductor revenue by 2012. IDC expects the MIMO-enhanced 802.11n technology to be the next growth driver for this market as the higher throughput and range provide a great opportunity for new applications and usage models.

2.5 Huawei to expand Uganda Telecom's Next Generation Network with investment of more than US\$10 M. Huawei will replace 33 analog RLUs (remote line units) spread across Uganda with new state-of-the-art soft switches. Made up of a central information management center and a multiservice access network, the upgraded NGN network will allow Uganda Telecom to provide converged voice and data solutions over ADSL. Huawei will also supply 7 new CDMA landline sites and transfer existing sites from a wireless loop to the NGN.

2.6 MTN to link up to 89 Nigerian bank branches with a 5-year deal to provide 1st City Monument Bank (FCMB) with a WAN (wide area network), linking up to 89 of the bank's branches nationwide. With more than 3,400 bases stations in Nigeria, MTN can promise better service delivery to both individual and corporate customers like FCMB

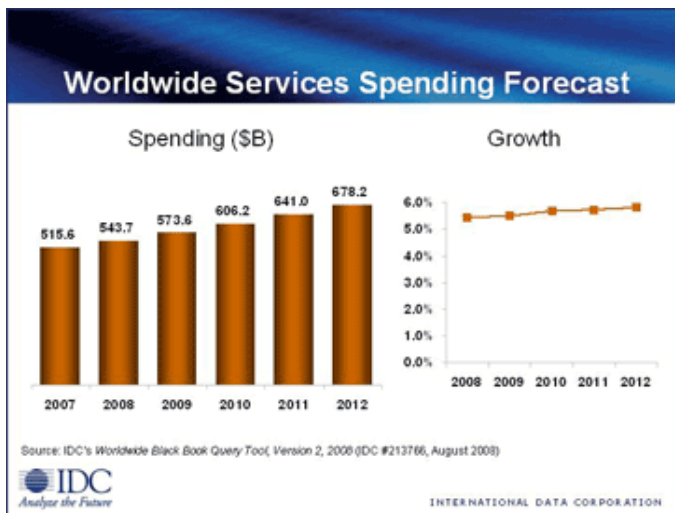
2.7 Vodafone to clean Ghana Telecom of debt. Exactly 30 days after Vodafone received parliamentary approval to acquire 70 % of shares in the debt-ridden Ghana Telecom (GT), the multinational telecom giant has stated its intention to clear GT of all liabilities Vodafone-GT had already upgraded services, introducing high-quality Broadband4U modems and providing 15,000 additional fixed lines in parts of Accra and the Ashanti Region. The company also cleared 80 % of installation backlog for corporate customers and increased its Broadband4U customer base in the Western Region. Vodafone International Holdings bought a 70 % stake in GT for US\$900 M at a time when the Ghanaian company was in debt to the tune of \$400 M.

2.8 ZTE to build Mauritania WiMax network. The contract for the 2.5GHz network is from Chinguitel, a telecom carrier under Espresso Telecom Group (ETG), and ZTE will provide core network equipment, wireless access devices and various communication terminals for indoor and outdoor use.

2.9 Africa 24 online TV goes live. The portal will contain stories written and produced by African journalists and will be sold globally to interested outlets for 60 % of the revenue generated by a story. The online content site is the 1st phase in the launch of a continental TV channel, though the company did not reveal when broadcasting will begin.

2.10 MTN acquires two major operators in Ivory Coast - fixed-line operator, Arobase Telecom, and Afnet, an ISP. Arobase Telecom was incorporated in 2001 and signed a concession agreement with the state of Côte d'Ivoire that allows it to offer data services using fiber-optic, wireless local loop and CDMA. Established in 1997, Afnet is one of the leading ISPs in Ivory Coast and offers wireless broadband technology and data services to the public. The acquisitions follow similar acquisitions by MTN in Nigeria, Cameroon and South Africa. The expansion, Nhleko explained, is in line with MTN's strategy to provide integrated communications solutions in all of its markets. MTN is the largest mobile-phone service provider in Africa, with a subscriber base of 74 M across 21 countries.

3. SW, ITS AND SECURITY MARKETS



3.1 South Africa IT services market in totaled \$3,810.97 M, representing YoY growth of 14.7% in U.S. dollar terms. Measured in the local currency (ZAR), the market expanded 19.4% YoY. Dimension Data was the leading IT services provider with 12.4% share. Business Connexion (BCX) placed 2nd, GijimaAst ranked 3rd. The State IT Agency (SITA) and Bytes Technology Group (BTG) rounded out the top. The network and desktop outsourcing services category accounted for the largest (17.2%) share of IT services revenue in 2007, followed by information system outsourcing (15.4%), and HW support and installation (12.6%). The combined outsourcing category comprised 41.9% of the South Africa IT services market in 2007. In 2007, the combined government sector was the largest vertical market. The combined finance sector placed 2nd, with 21.3% market share. The telecommunications sector undertook IT services investment. The 4th-largest sector was agriculture, construction, and mining. IDC expects spending on IT services in South Africa to increase at a compound annual growth rate (CAGR) of 12.4% over the 5-year forecast period.

3.2 Ukrainian EAS market grew at a healthy YoY rate of 38.7% in 2007 to total \$41.28 M. SAP was once again the leading supplier with 47.2% market share. Oracle generated 10.9% share and slipped down to 4th place. Microsoft Dynamics became the 5th-largest player. In 2007, ERM was the largest functional area, followed by SCM and operations and manufacturing. The least-popular functional areas CRM, and business analytics. In 2007, the process-manufacturing sector remained the top vertical on the Ukrainian market in terms of EAS spending: \$7.53. The discrete manufacturing sector was second, with 18.0% share. Agriculture, mining, and construction were the number-three vertical in Ukraine last year, with a 13.7%. IDC expects the Ukrainian EAS market to expand at a compound annual growth rate (CAGR) of 22.3% over the five-year forecast period ending in 2012. EAS expenditure is anticipated to reach \$113.13 M.

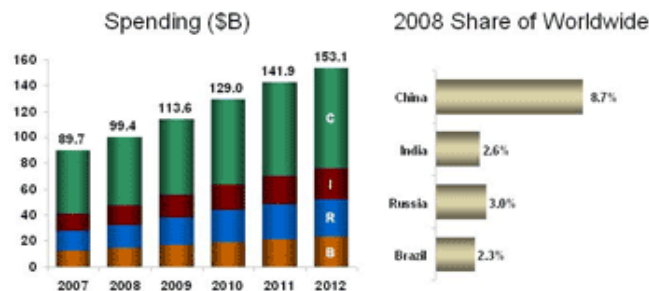
3.3 Worldwide virtualization license shipments in 2Q08 increased 53% YoY, compared to a 72% YoY. The x86 server market led the way with 60% YoY growth followed by the EPIC server market with 18% growth. Worldwide CISC and RISC server virtualization licenses declined 15% and 7% YoY, respectively. Worldwide new server shipments virtualized increased 52% YoY in 2Q08, compared to 70% growth in 1Q08. Worldwide virtualization SW revenue grew 15% YoY in 2Q08, compared to 32% growth in 1Q08. The growth in virtualization SW revenue primarily came from the x86 server market, which grew 39% YoY. EPIC virtualization SW revenue also increased YoY, albeit at a slower pace of 9%. **HP** held onto its # 1 spot for worldwide new server shipments virtualized with 34% market share and 52% YoY growth. **Dell** solidified its position as the # 2 vendor with its market share growing from 25% in 1Q08 to 29% in 2Q08, powered by 110% YoY growth. **IBM** remained in the 3rd position with 16% market share. IBM achieved 32% YoY growth driven by a solid performance from its Power Systems servers. VMware grew its x86 server virtualization SW business 27% YoY and maintained the # 1 position in the market with 78% revenue share in 2Q08. When looking at new x86 virtualization licenses, VMware continues to hold on to its strong position in the x86 market with a combined market share of VMware ESX and VMware Server at 44%. However Microsoft Hyper-V delivered a strong showing, and when combined with Virtual Server 2005, Microsoft's market share is 23% of new shipments.

3.4 Search and discovery market continues to outpace the SW market as a whole, according to IDC and predicts 17% growth for search and discovery SW in 2008 and 12.9% growth for 2009. This is down from the 28% growth we saw in 2007, but certainly a healthy increase. With the economy so volatile, this could change if economic conditions worsen. The search market will continue to fragment into 3 tiers: OEM, solutions, and platforms, with solutions that address a specific task or problem growing at a faster rate than the other two market segments.

3.5 Spending on IT cloud services to grow almost 3 fold, reaching \$42 B by 2012 and accounting for 9% of revenues in 5 key market segments. More importantly, spending on cloud computing will accelerate throughout the forecast period, capturing 25% of IT spending growth in 2012 and nearly a 3rd of growth the following year. Cloud Computing is an emerging IT development, deployment, and delivery model, enabling real-time delivery of products, services, and solutions over the Internet. The attributes of cloud services make the consumption of goods and services easier and cheaper – and often better – than through traditional delivery modes. These attributes also lower costs, simplify and accelerate access, enable fine-tuned provisioning, greatly increase the # and variety of available services, and improve the potential to integrate these services. IDC believes there are two principal opportunities for IT suppliers from the growth of cloud services.

4. ICT MARKETS AND VERTICAL INDUSTRIES TRENDS

BRIC Hardware Spending Forecast



Source: IDC's Worldwide Black Book Query Tool, Version 2, 2008 (IDC #213766, August 2008)

4.1 IT spending in Austria totaled \$8.73 B in 2007, up 14.4% YoY. HW accounted for 33.6% of the total IT market, SW for 21.2%, and services for 45.2%. IDC expects the IT market will expand 4.8% YoY in 2008 to \$9.16 B. Over the 5-year forecast period ending in 2012, the Austrian IT market should increase at a compound annual growth rate (CAGR) of 5.0% with the strongest growth seen in the SW segment. The combined finance sector (banking, insurance, and other financial services) was the biggest spending vertical in 2007, investing \$2.05 B and accounting for 23.5% of total IT spending. Manufacturing firms were responsible for the 2nd-largest share of IT expenditure in Austria last year, at 21.7%, or \$1.90 B. Process manufacturers are still under market pressure to reduce their operating and infrastructure costs. Transport, communications, and utilities was the 3rd-largest vertical in terms of IT spending in 2007, investing \$1.09 B and accounting for 12.6% of total IT. The Austrian retail and wholesale sector spent \$1.01 B on IT in 2007.

4.2 Albania's IT market continued to grow solidly fuelled by increased spending in the government, finance, and telecom sectors, falling equipment prices, and favourable economic development. And reached \$89.34 M in 2007, representing 28.3% YoY growth. In local currency, the market expanded 16.3% YoY. The Albanian IT market is heavily HW-oriented due to its relatively early stage of development. Combined revenue from shipments of PCs, servers, storage devices, and hardcopy peripherals amounted to about 80% of the market in 2007. Nevertheless, IT services were the fastest expanding IT market segment in 2007, recording 49.3% YoY growth. IDC expects the Albanian IT market to expand at an annual average of 16.7% over the next 5 years to reach \$193.4 M in 2012.

4.2 IT market in Bulgaria totalled \$944.12 M, representing YoY growth of 32.3% in U.S. dollar terms. Measured in local currency, the market expanded by 20.5% over the previous year. The communications sector was the largest vertical market in Bulgaria in 2007 in terms of IT expenditure, spending \$209.82 M for a 22.2% market share. The manufacturing sector placed 2nd, with a 14.5% market share based on IT expenditure of \$136.81 M. The combined finance (banking, insurance, and other financial services) vertical undertook IT investment of \$125.05 M last year to rank as the 3rd-largest spending vertical, with a 13.2% market share. The 4th-largest vertical was combined government, which accounted for 13.2% (\$124.54 M) of total IT services spending in the country last year. Demand for HW, SW, and IT services in Bulgaria to rise over the next 5 years, driven by increased consumer spending, an increasing # of businesses in the country and an improving business environment, increased public-sector spending (underpinned by recent EU accession), and economic stability.

4.3 IT spending in Hungary reached \$3.10 B in 2007, which represents 16.3% growth YoY. Transport, communications, and utilities remained the biggest combined vertical in terms of spending last year, reaching \$863.93 M and accounting for 27.8% of the total IT spending. The manufacturing vertical remained the second strongest in the Hungarian market in 2007, representing investments of \$523.37 M for a 16.9% share. The finance vertical is the third largest in terms of IT spending, totalling \$517.58 M for 16.7%. The public sector's IT spending reached \$499.48 M in 2007, which is below the average increase of the year before. IT expenditures in the public sector accounted for 16.1% of the total market. Public spending stagnated mainly due to the government's restrictive spending policy and several delays in annual framework contracts. IDC predicts that IT spending in Hungary will increase at a CAGR of 6.6% over the forecast period to reach \$4.27 B in 2012. Healthy spending on IT services and business software, as well as investments into storage infrastructure solutions, are expected to fuel this growth.

4.4 Ten global application outsourcing (AO) providers earned as of year-end 2007 nearly \$27 B, with 64% tied to discrete engagements and 36% integrated within larger IS outsourcing (ISO) contracts. Discrete and bundled AM service revenue reached an estimated \$35 B in 2007 for the top 25 global service providers. This reflects growing adoption of enterprise use of 3rd-party providers, not only for standalone AM service but also for transformational value-added services linked into AM or broader bundled outsourcing solutions. Revenue estimates indicate that most traditional players have grown sizeable AM practices embedded within ISO infrastructure deals (e.g., IBM, EDS, CSC, Siemens). Indian pure-players started with a discrete AM focus, which is now shifting as most outsourcers strengthen their services to address the full technology stack. IBM held a significant combined application management services lead at nearly \$7.3 B, reflecting its historical growth and flexibility in evolving an AM practice that supports discrete and embedded AM solutions.

4.5 Weak economy creating buyer's market for IT purchases. The dismal economy may be hurting some SW vendors' earnings reports and putting a crimp in IT budgets, but it has also created a buyer's market. Now's the time to buy more licenses should you need them and if you have the cash to spare. Economic conditions are causing organizations to delay buying decisions, so the major vendors are aggressively discounting to prospects that are willing to make a decision quickly. [But] the business model of the major vendors is increasingly focused on maintenance fees, which are a recurring revenue source year after year.

4.6 IBM to help Ghana launch pre-incubation center in collaborating with the Ghanaian Ministry of Communications. The Ghana Multimedia Incubator Center (GMIC) is supported by IBM jointly with UNDP and the Kwame

Nkrumah University of Science and IBM's US\$250 M Corporate Service Corps global initiative sends high-potential employees from different nations and business units to countries in Africa, Asia and Eastern Europe for one month.

4.7 Nigeria needs about 6,000 qualified Licensed Penetration Testers (LPTs) to manage its Internet security issues optimally according to Nigeria's Economic and Financial Fraud Commission (EFCC) that are on the prowl for online fraudsters operating from their homes. Changing its tactic of focusing solely on cyber cafés, the agency now plans to unplug Internet connections at residences and hotels where fraudsters operate. The agency has opened formal discussions with mobile phone operators to provide a window through which activities of users could be accessed. There are more than 5 M CDMA phones spread across more than 50 cities and towns, with the greatest concentration in Lagos. The EFCC is one of the government bodies lobbying for registration of all SIM (Subscriber Identity Module) cards and Internet access points. The government is already in discussions with the country's legislative chambers to enact laws that would make it mandatory for networks to get proper documentation on every SIM card owner in the country.

4.8 Africa Banking Corporation will roll out BankWorld SW, an self-service platform from CR2, as part of its latest initiative to offer integrated financial services and to manage its ATM, Internet, mobile and point-of-sale networks in Botswana, Mozambique, Tanzania, Zambia and Zimbabwe. The bank hopes to use the mobile platform to extend its customer reach by addressing the unbanked market and providing powerful security through two-factor authentication and one-time passwords.

4.9 Dimension Data has entered the Angolan market with the acquisition of a 51 % stake in Sistemas Redes e Comunicações (SRC), an IT solutions company. Incorporated in 1996, SRC Angola has provided technology and communication products and. Dimension Data hopes to benefit from SRC's experience to enable it to deliver specialized products and services in the oil-rich Southern African country. Dimension Data expects to serve the multinational corporations operating in Angola's oil industry; some of them are existing clients at the international level.

5. RECENT IDC CEMA MARKET STUDIES

Austria Vertical Markets 2008-2012 Forecast. IDC# EV10Q

<http://www.idc.com/getdoc.jsp?containerId=EV10Q>

Bulgaria Vertical Markets 2008-2012 Forecast. IDC# EV01Q

<http://www.idc.com/getdoc.jsp?containerId=EV01Q>

Czech Republic Disk Storage Systems 2008-2012 Forecast and 2007 Vendor Shares. IDC# EST2Q

<http://www.idc.com/getdoc.jsp?containerId=EST2Q>

Hungary Vertical Markets 2008-2012 Forecast. IDC# EV04Q

Egypt Personal Computing 2008-2012 Forecast and 2007 Vendor Shares. IDC# ZJ02Q

<http://www.idc.com/getdoc.jsp?containerId=ZJ02Q>

Russia Disk Storage Systems 2008–2012 Forecast and 2007 Vendor Shares. Doc # EST6Q

<http://www.idc.com/getdoc.jsp?containerId=EST6Q>

South Africa Disk Storage 2008-2012 and 2007 Vendor Shares. IDC# ZST3Q

<http://www.idc.com/getdoc.jsp?containerId=ZST3Q>

South Africa IT Services 2008-2012 Forecast and 2007 Vendor Shares. IDC# ZS06Q

<http://www.idc.com/getdoc.jsp?containerId=ZS06Q>

Ukraine Enterprise Application SW 2008–2012 Forecast and 2007 Vendor Shares. IDC# ER13Q

Voice Services and Fixed-Line Strategies for Central and Eastern European Operators. IDC# EW07Q

<http://www.idc.com/getdoc.jsp?containerId=EW07Q>

6. UPCOMING IDC CEMA EVENTS

<http://www.idc-cema.com/index.php?nd=Events>

IDC IT Security Roadshow 2008

Dubai November 05 | Riyadh November 09 | Doha December 03

<http://www.idc-cema.com/?showproduct=31092>

IDC IT Security Roadshow 2009

<http://www.idc-cema.com/?showproduct=34356>

Kiev February 24 | Istanbul February 25 | Bucharest February 26 | Ljubljana March 10 | Athens March 11 | Prague March 12 | Sofia March 17 | Budapest March 19 | Moscow March 24 | Zagreb March 26 | Warsaw March 31 | Bratislava April 02 | Belgrade April 07 | Vienna September 09 - 10 | Sarajevo September 24, 2009

IDC MEA CIO Summit Series 2009 - February 08 - February 25 Dubai | Sun City

http://www.idc-cema.com/?showproduct=34399&content_lang=ENG

IDC Virtualization, Data Centers, Security and Business Continuity Roadshow 2008

Nairobi October 16, Istanbul October 22, Casablanca November 25, Johannesburg November 19, 2008

<http://www.idc-cema.com/?showproduct=31110> <http://www.idc-cema.com/?showproduct=34290>

<http://www.idc-cema.com/?showproduct=34103>

IDC Business Intelligence Roadshow 2008

Istanbul November 04, Athens November 13, Belgrade November 20 | Warsaw November 25, Moscow November 27,

<http://www.idc-cema.com/?showproduct=31388>

IDC's IT in MEA Government Roadshow 2008

Nairobi November 05, Abu Dhabi November 19, Riyadh November 24, Ankara November 25, Abuja November 27, 2008 | Cairo December 01, 2008

<http://www.idc-cema.com/?showproduct=31309>

IT in Metallurgy - November 12, 2008, Moscow, Russia

<http://www.idc-cema.com/?showproduct=34162>

Informationstage AUSTRIAN ELECTRONIC NETWORK

October 03 - December 17, 2008 Villach, Schwaz/Tirol, Salzburg, Steyr, Leoben, Wien, Austria

<http://www.idc-cema.com/?showproduct=34324>

IDC - VMware Virtualization Summit 2.0 2008 – November 04, 2008 Warsaw, Poland

<http://www.idc-cema.com/?showproduct=34492>

IDC - VMware Virtualization Summit 2.0 2008 – November 05, 2008 Budapest, Hungary

<http://www.idc-cema.com/?showproduct=34507>

IDC – IBM Leadership Forum - November 12, 2008 Casablanca, Morocco

<http://www.idc-cema.com/?showproduct=34455>

Innovative Mobile Services & New Revenue Models 2008 – November 20, 2008 Sofia, Bulgaria

<http://www.idc-cema.com/?showproduct=34512>

IDC Green Day 2008. Green IT Award 2008 - November 26, 2008 Vienna, Austria

<http://www.idc-cema.com/?showproduct=31658>

IDC ICT in the Utilities & Energy Sectors 2008 - November 27, 2008 Bucharest, Romania

<http://www.idc-cema.com/?showproduct=34454>

2. Service Oriented Architecture Konferenz 2009 – April 22, Vienna, Austria

<http://www.idc-cema.com/?showproduct=34531>

7. FREE IDC MARKET STUDIES AND TELEBRIEFINGS

The Channel Future – What you need to be prepared, relevant and competent – FREE RESEARCH

<http://www.idc.com/research/channel/index.jsp>

IT HW Asset Disposition Industry: What Consolidation? More Confusion Ahead. Telebriefing

Nov 06, 2008

http://www.idc.com/getdoc.jsp?containerId=IDC_P18628

Storm Warning: Impact of the Financial Crisis on IT Spending. Telebriefing

Nov 13, 2008

http://www.idc.com/getdoc.jsp?containerId=IDC_P18658

What's Driving U.S. Business Telecommunications Services Spending? Telebriefing

Nov 20, 2008

http://www.idc.com/getdoc.jsp?containerId=IDC_P18661

IDC Predictions 2009. Telebriefing

Dec 04, 2008

http://www.idc.com/getdoc.jsp?containerId=IDC_P18759

FURTHER INFORMATION

If you have any questions about any of the content of this newsletter or would like additional information about any of IDC's CEMA research services or events, please don't hesitate to contact us at any of the #s listed below.

**Tatiana Hinova,
Assoc. Vice President Sales
IDC CEMA**

Male Namesti 13, 110 00 Praha 1, Czech Republic

Tel. +420 221 423 155, Cell +420 732 859 663, Fax +420 221 423 150

thinova@idc.com

