

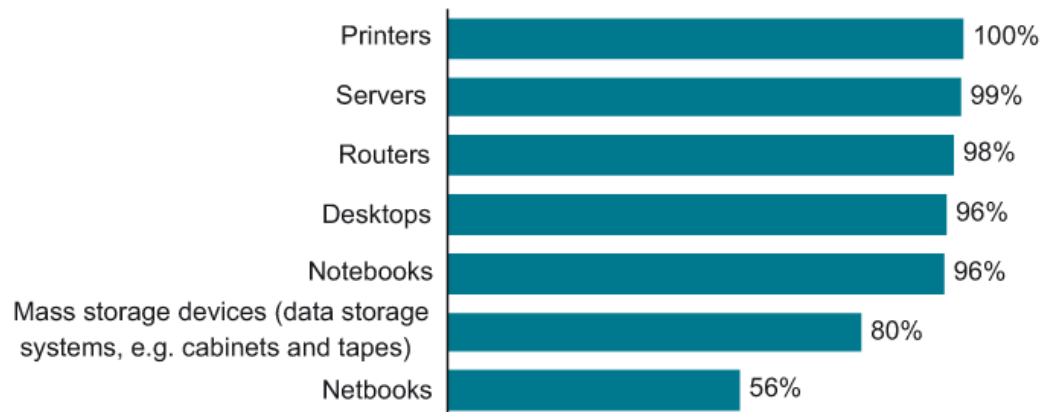


Growing importance of portable computers in Polish enterprises

Big companies in Poland increasingly use portable computers, whose share in the total number of computers used constantly grows. Over the last few years, replacement cycles of hardware in large enterprises in Poland have remained almost unchanged.

Large companies in Poland are fully equipped with basic devices, including printers, servers and routers. Desktops, used by 96% of enterprises, are supplemented with notebooks (96%) and netbooks (56%). 80% of companies use mass storage devices.

IT equipment penetration in large scale enterprises in Poland (%), April 2011



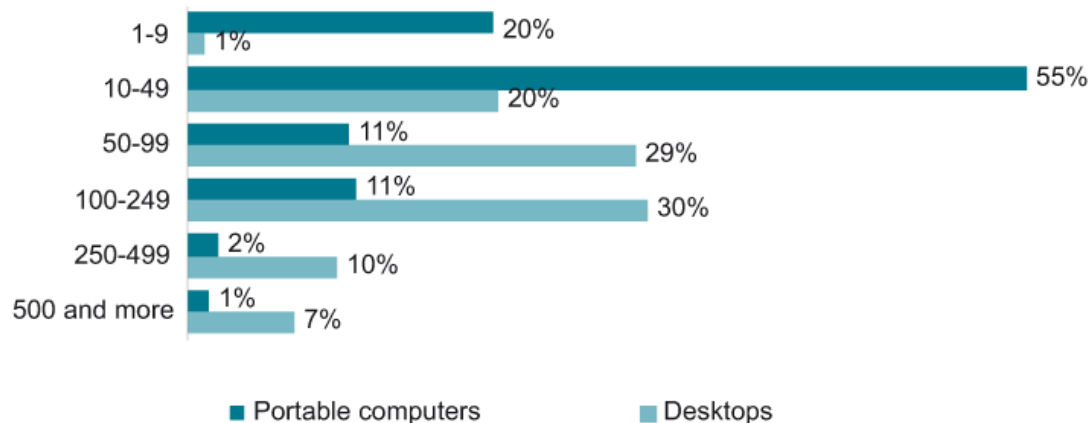
Source: PMR Research, 2011


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29% of large companies have 50-99 workstations equipped with desktop computers, and another 31% have 100-249 such workstations. When adding to that group 20% of large companies where the number of desktop computers is in the range between 10 and 49 machines, it can be seen that in 80% of large companies the number of desktops ranges between 10 and 249. In the case of other companies that range is definitely different. 1% of companies are (most often production) companies with a definitely low percentage of office workers or those in which portable computers are most commonly used.

More than a half of large companies (55%) have 10-49 portable computers (notebooks and netbooks). 20% of the surveyed companies have not more than nine such computers. Only 3% of the companies have more than 250 portable computers.

Number of desktops and portable computers in large scale enterprises in Poland, April 2011

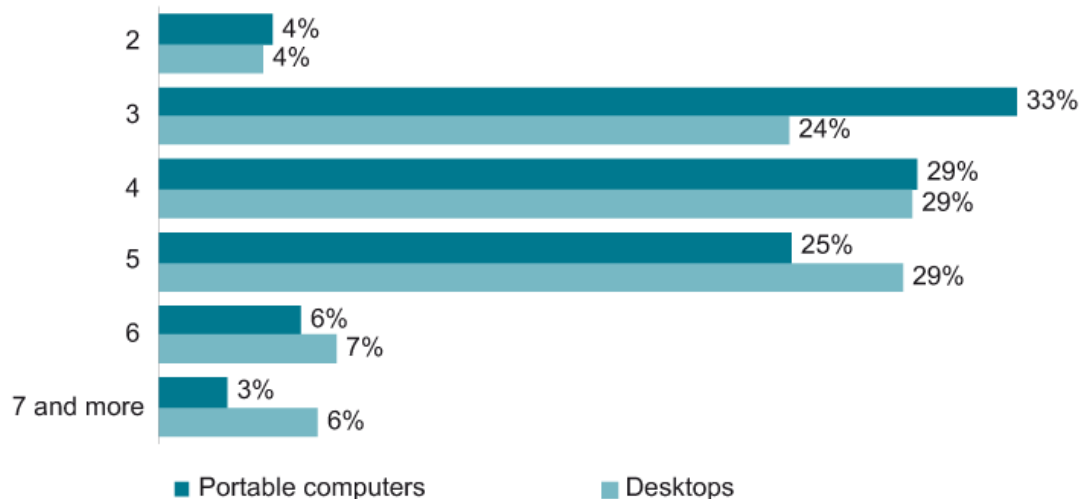


Source: PMR Research, 2011

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The average number of computers in large companies from the six surveyed sectors in Poland is 222 and is by 15 lower when compared to the large companies survey conducted by PMR in 2005 in relation to the analogous user sample. The share of portable computers among all computers used by large companies in Poland has significantly grown. That percentage has increased from 15% to 26%.

Number of years after which desktops and portable computers are replaced with new ones in large scale enterprises in Poland, April 2011



Source: PMR Research, 2011

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The average usage time for desktop computers in large companies is just over four years. In most cases, the usage time for desktop computers in large companies is 4 or 5 years. That usage time of desktop computers refers to 29% of companies. Only 24% of the surveyed companies replace their computers with new ones after three years of use. 4% of companies replace computers after just two years. 6% of companies use desktop computers for seven or even more years.

The average usage time for portable computers in large scale enterprises is less than four years. Almost every third (33%) enterprise replaces portable computers after just three years, every fourth company (29%) after four years and 25% after five years. Only 9% of large companies replace portable computers with new ones after six or more years. "It is worth noting that the average usage time for both desktop and portable computers has been extended by a few months, which is not a significant change when compared to the analogous large companies survey conducted by PMR in 2005", comments Pawel Olszynka, a PMR head analyst and the report co-author.

Remarks on methodology

This press release is based on information contained in the latest PMR report entitled "Software applications, ICT services and infrastructure in large enterprises in Poland 2011."

The report was based on the questionnaire survey conducted in April 2011 by PMR Research (www.research-pmr.com) – a PMR division specialising in marketing research and market analysis. The survey was conducted with the use of CATI (Computer-Assisted Telephone Interview) technique and standardised survey questionnaire. The survey was conducted from the telephone studio of PMR Research. In total, 417 of properly processed interviews were conducted. The respondents in surveyed enterprises were people with the most extensive knowledge of IT issues, first of all IT specialists or managers of IT departments.

The survey results are representative for the population of Polish enterprises employing 250 and more people, operating in the following sectors:

- utilities: power plants, heat and power stations, electricity boards, water and wastewater companies and other utilities
- finance (banks, insurance, leasing companies, funds, financial agencies)
- retail and wholesale trade, distribution of goods
- production of machines and equipment, finished metal and smelter products, plastic products, furniture
- production of beverages, food, chemical products (FMCG)
- transport and logistics services.

Our estimates show that the whole surveyed population – registered and active companies from the above sectors in Poland employing 250 or more people – consists of more than 2,400 entities.

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