

CANADA

Canada's Vibrant IT Sector Could Create 18,000 High Tech Jobs

Nurtured by low software piracy, Canada's IT sector has already expanded into a \$27-billion thriving industry. However, the best is still ahead. With the help of a 10-point reduction in its 36 percent software piracy rate, Canada's IT sector could grow to \$34 billion by 2009, creating new opportunities for entrepreneurs and new jobs for Canada's workforce.

Reductions in Software Piracy Could Further Boost Canada's Economy

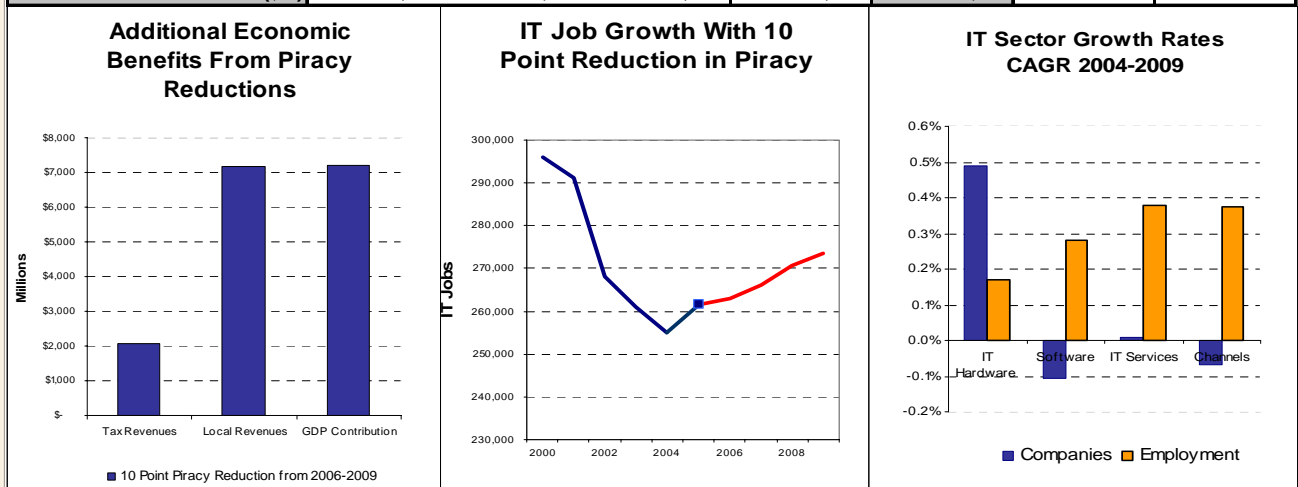
Decreasing Canada's piracy rate to 26 percent would add more than \$7 billion to its economy, create 14,000 new jobs, and increase local industry revenues by more than \$7 billion. These economic stimulants would, in turn, generate an additional \$2 billion in tax revenue to help the Canadian government pay for public benefits and services.

Strong software growth is a proven driver of IT sector benefits — adding \$1.3 billion in new software revenues alone to the economy between 2000 and 2004. By further reducing its software piracy rate, Canada could accelerate its future IT sector growth — adding 18,000 new jobs as it grows 24 percent larger instead of the projected 17 percent between 2004 and 2009.

Engine for Economic Growth

Canada's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	CAD Millions	USD Millions	CAD Millions	USD Millions	CAD Millions	CAGR
IT Hardware	\$ 12,281	15,981	\$ 10,302	13,406	\$ 11,430	14,875	2.1%
Software	\$ 4,271	5,559	\$ 4,767	6,204	\$ 5,711	7,432	3.7%
IT Services	\$ 10,922	14,213	\$ 12,402	16,139	\$ 14,889	19,376	3.7%
Total IT Revenue	\$ 27,474	35,753	\$ 27,471	35,750	\$ 32,031	41,683	3.1%

Canada's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 36,217	\$ 37,696	\$ 44,391	\$ 47,306	\$7,206	17.8%
Jobs	296,001	255,063	259,171	273,402	14,232	1.6%	7.2%
IT Tax Revenues (\$M)	\$ 27,126	\$ 27,250	\$ 29,522	\$ 30,350	\$2,083	8.3%	11.4%



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UNITED STATES

Already Benefiting From Low Piracy, the United States Stands to Gain More Than Any Other Nation With Further Reductions

Although low software piracy is already fueling substantial IT benefits, even greater benefits lie ahead. Strong demand for software has helped the U.S. IT sector grow into a \$400-billion engine for economic growth. A further 10-point drop in piracy could allow the U.S. to unlock a new era of IT-fueled economic growth and prosperity — gaining more than any other nation in the global survey.

Less Piracy Means Even More Growth

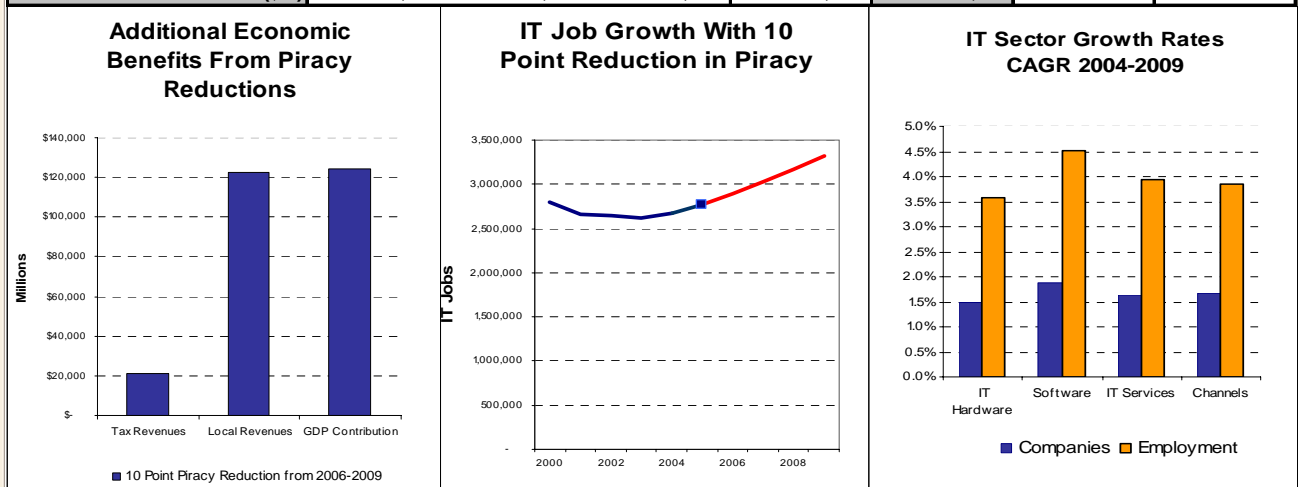
Cutting the piracy rate in the United States from 21 percent to 11 percent could add nearly \$125 billion to the economy and create more than 100,000 new high-wage jobs. The aggregate economic impact of this IT growth could generate an additional \$21 billion in much needed tax revenues.

Low Piracy and High Software Demand Are Proven Economic Drivers

Having the world's lowest software piracy rate has helped the United States develop the world's largest software industry. This dynamic software industry fuels broader IT sector growth, which now consists of 300,000 businesses, employing more than 2.6 million Americans and generating almost \$400 billion a year in taxes. Although the IT sector is already projected to grow by almost a third between 2004 and 2009, it could grow nearly 10 percentage points faster with further piracy reductions.

United States's IT Sector				Growth 2004-2009
	2000	2004	2009	CAGR
Revenue **	USD Millions	USD Millions	USD Millions	
IT Hardware	\$ 182,397	\$ 127,108	\$ 162,006	5.0%
Software	\$ 91,037	\$ 98,317	\$ 133,422	6.3%
IT Services	\$ 148,398	\$ 170,478	\$ 222,651	5.5%
Total IT Revenue	\$ 421,832	\$ 395,903	\$ 518,078	5.5%

United States's IT Economic Benefits				Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction		
Contribution to GDP* (\$M)	\$ 813,411	\$ 818,609	\$ 1,077,875	\$ 1,129,095	\$124,377	31.7%
Jobs	2,802,979	2,668,340	3,210,589	3,316,100	105,511	20.3%
IT Tax Revenues (\$M)	\$ 367,421	\$ 397,989	\$ 531,658	\$ 540,378	\$21,069	33.6%



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AUSTRIA

Austria's IT Sector Could Grow a Third Larger — Creating New Economic Opportunities, Jobs, and Tax Revenues

Growing demand for software has helped Austria's IT sector transform into a \$7-billion-a-year driver of new opportunities. If the country further reduced its 25-percent piracy rate by 10 points, its IT industry could grow to \$9.7 billion by 2009.

Reducing Piracy Could Mean Millions in New Tax Revenues

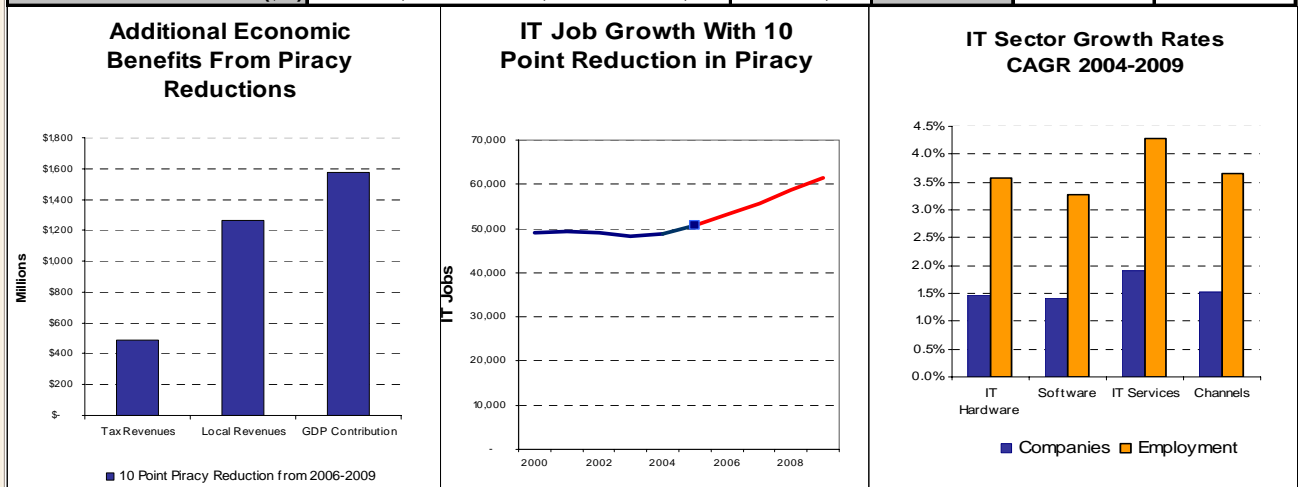
Decreasing Austria's piracy rate to 15 percent would add \$1.5 billion to its economy, create 2,400 new jobs, and increase local industry revenues by more than \$1.2 billion. As a result, IT industry growth could generate an additional \$480 million in tax revenue to help pay for Austrian public benefits and services.

An IT Sector Poised for Growth

With the help of the European Union's lowest software piracy rate, demand for software grew 10 percent between 2000 and 2004. This software growth helped the software sector enlarge by \$119 million over the same period. If Austria reduces its software piracy rate another 10 points by 2009, Austria's IT sector could see 12,000 more IT jobs created to become a 61,000-employee economic engine.

Austria's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 3,872	3,117	\$ 2,494	2,008	\$ 3,177	2,558	5.0%
Software	\$ 1,143	920	\$ 1,262	1,016	\$ 1,577	1,270	4.6%
IT Services	\$ 2,969	2,391	\$ 3,360	2,705	\$ 4,486	3,612	5.9%
Total IT Revenue	\$ 7,984	6,428	\$ 7,117	5,730	\$ 9,240	7,439	5.4%

Austria's IT Economic Benefits							Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction					
Contribution to GDP* (\$M)	\$ 11,114	\$ 10,646	\$ 13,908	\$ 14,551	\$1,578	30.6%	36.7%		
Jobs	49,135	48,859	59,164	61,566	2,402	21.1%	26.0%		
IT Tax Revenues (\$M)	\$ 7,604	\$ 7,844	\$ 10,122	\$ 10,321	\$486	29.0%	31.6%		



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BELGIUM

Belgium's IT Sector Is a Proven Economic Engine That Could Grow Into a Thriving, \$13-Billion Powerhouse

Low software piracy and a growing software sector have already helped Belgium translate growth in its IT sector into tangible economic benefits — creating more than 8,000 new jobs since 2000 as the sector grew to \$9.4 billion a year. If Belgium further reduced its 29-percent piracy rate by 10 points, its IT sector could grow to nearly \$13 billion by 2009.

Less Piracy Could Mean More Growth

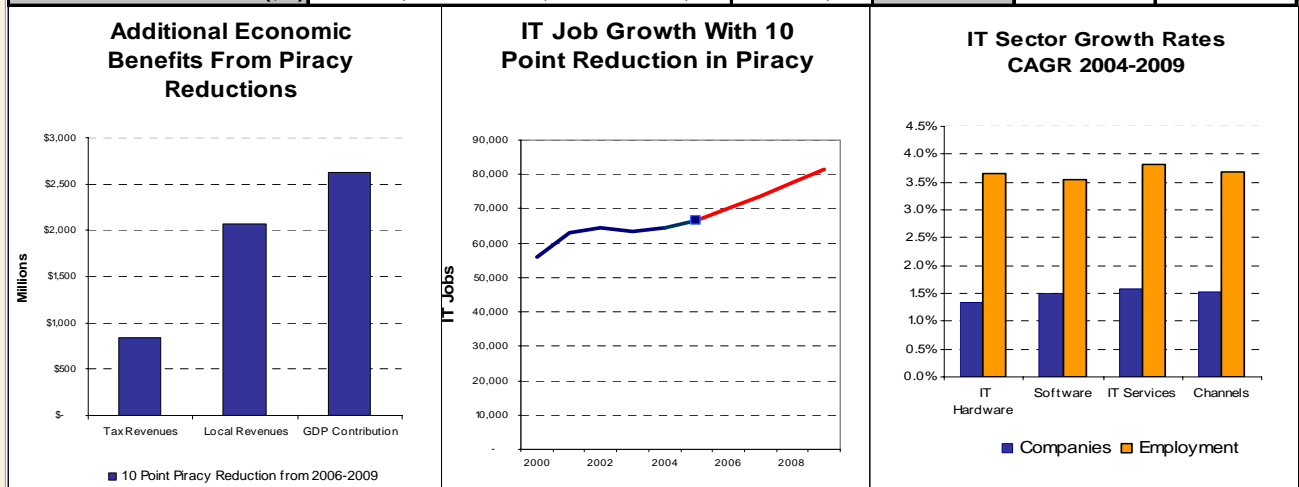
Decreasing Belgium's piracy rate to 19 percent would add \$2.6 billion to its economy, create nearly 4,000 new jobs, and increase local industry revenues by more than \$2 billion. A piracy cut would also help generate \$844 million in additional tax revenue.

Software Is an Engine for Economic Growth

Strong demand for software has helped Belgium's software sector grow faster than either its hardware or IT services sector between 2000 and 2004. This strong software growth helped fuel IT sector benefits — creating more than 8,000 new IT jobs in the same period. By further reducing its software piracy rate, Belgium could further accelerate its future IT sector growth — growing 36 percent instead of the projected 29 percent between 2004 and 2009.

Belgium's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 4,272	3,439	\$ 3,188	2,567	\$ 4,090	3,293	5.1%
Software	\$ 1,908	1,536	\$ 2,092	1,685	\$ 2,661	2,143	4.9%
IT Services	\$ 3,848	3,098	\$ 4,097	3,299	\$ 5,303	4,270	5.3%
Total IT Revenue	\$ 10,028	8,074	\$ 9,378	7,550	\$ 12,054	9,705	5.1%

Belgium's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 14,254	\$ 13,902	\$ 17,891	\$ 18,967	\$2,630	28.7%	36.4%
Jobs	56,152	64,463	77,389	81,367	3,978	20.1%	26.2%
IT Tax Revenues (\$M)	\$ 9,336	\$ 10,255	\$ 13,052	\$ 13,396	\$844	27.3%	30.6%



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DENMARK

Denmark's Burgeoning IT Sector is Characterized by Growth and Opportunity

Strong software demand and lower-than-average piracy have helped Denmark's IT sector become an \$8-billion-a-year industry. Denmark's IT sector could add another 14,000 jobs with the economic stimulus created by a 10-point drop in its 27-percent software piracy rate.

Cutting Piracy Could Speed Growth

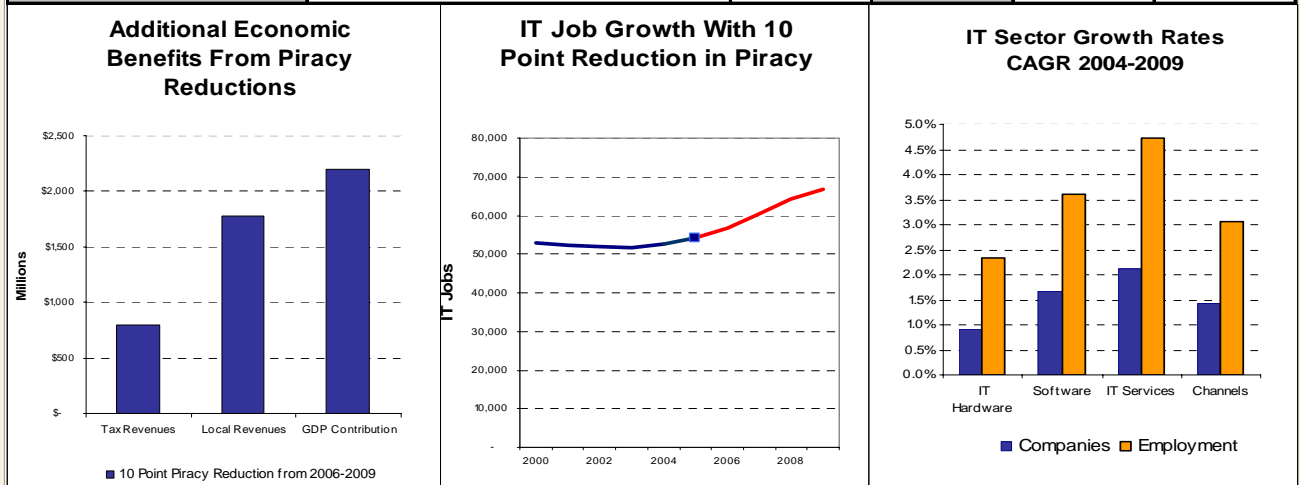
Cutting Denmark's piracy rate from 27 percent to 17 percent could add nearly \$2.2 billion to its economy, increase local industry revenues by more than \$1.7 billion, and pump nearly \$800 million into Denmark's tax coffers. The 10-point reduction could also increase the number of workers currently employed in Denmark's emerging IT sector by more than 3,200.

Software Could Fuel Economic Acceleration

As software demand grew 14 percent between 2000 and 2004, the IT sector generated \$340 million in new software revenues alone for the economy. Denmark's IT sector, now one of the largest as a portion of its economy in the European Union, comprises nearly 8,000 businesses, employs more than 52,000 workers, and generates \$8 billion a year in taxes. Projected to grow by an already robust 29 percent, a further reduction in software piracy could instead produce 36-percent IT sector growth between 2004 and 2009.

Denmark's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	DKK Millions	USD Millions	DKK Millions	USD Millions	DKK Millions	CAGR
IT Hardware	\$ 3,928	23,530	\$ 2,540	15,218	\$ 2,970	17,793	3.2%
Software	\$ 1,305	7,817	\$ 1,485	8,897	\$ 1,896	11,356	5.0%
IT Services	\$ 3,273	19,603	\$ 3,771	22,588	\$ 5,184	31,051	6.6%
Total IT Revenue	\$ 8,506	50,951	\$ 7,796	46,703	\$ 10,050	60,200	5.2%

Denmark's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 11,973	\$ 11,784	\$ 15,473	\$ 16,374	\$2,194	31.3%	38.9%
Jobs	52,825	52,697	63,610	66,856	3,246	20.7%	26.9%
IT Tax Revenues (\$M)	\$ 7,679	\$ 8,140	\$ 10,648	\$ 10,975	\$797	30.8%	34.8%



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FINLAND

With a Fast-Growing Software Industry, Finland's IT Sector Could Grow 42 Percent and Create Another 11,000 Jobs

Finland's IT sector stands to grow from \$5.7 billion today to \$8.2 billion by 2009 if the country can cut its 29 percent piracy rate by an additional 10 points. A reduction of that size would help Finland unleash the creative potential of its entrepreneurs, who in turn could employ 11,000 more of Finland's workers in IT jobs.

Reducing Piracy Could Accelerate Tech Sector Growth.

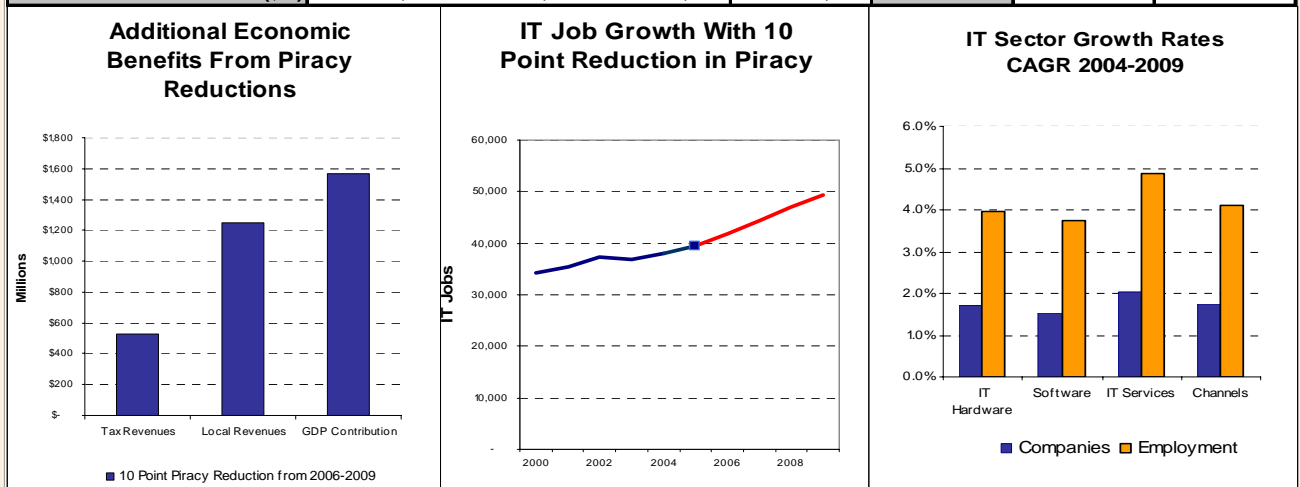
A 10-point drop in Finland's piracy rate could create 2,200 jobs and pump \$1.5 billion into the economy. It could also increase local industry revenues by more than \$1.2 billion and generate \$526 million in additional tax revenues.

Software Sector Poised For New Gains

Between 2000 and 2004, demand for software increased in Finland by 20 percent. Now its software sector is poised for rapid growth with an impressive 5.2 percent per year average growth rate through 2009. Decreasing Finland's piracy rate to 19 percent would help accelerate future growth and assist Finland's IT sector in becoming an \$8.2-billion, 50,000-employee economic dynamo by 2009.

Finland's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 2,660	2,141	\$ 2,030	1,634	\$ 2,655	2,137	5.5%
Software	\$ 921	742	\$ 1,105	890	\$ 1,425	1,147	5.2%
IT Services	\$ 1,924	1,549	\$ 2,623	2,112	\$ 3,644	2,934	6.8%
Total IT Revenue	\$ 5,506	4,433	\$ 5,758	4,636	\$ 7,723	6,218	6.0%

Finland's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 7,606	\$ 8,561	\$ 11,573	\$ 12,214	\$ 1,567	35.2%
Jobs	34,149	37,988	47,187	49,431	2,244	24.2%	30.1%
IT Tax Revenues (\$M)	\$ 5,250	\$ 5,948	\$ 8,219	\$ 8,436	\$ 526	38.2%	41.8%



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FRANCE

Lower Piracy Could Transform France's IT Sector Into a \$72-Billion Industry — Adding 109,000 New Jobs

Cutting France's 45-percent piracy rate by 10 points could unleash some of the European Union's largest economic, job, and tax benefits. The 10-point cut could help France's IT sector grow more than 35 percent — growing from \$53 billion to \$72 billion by 2009.

Fighting Piracy and Boosting the Economy

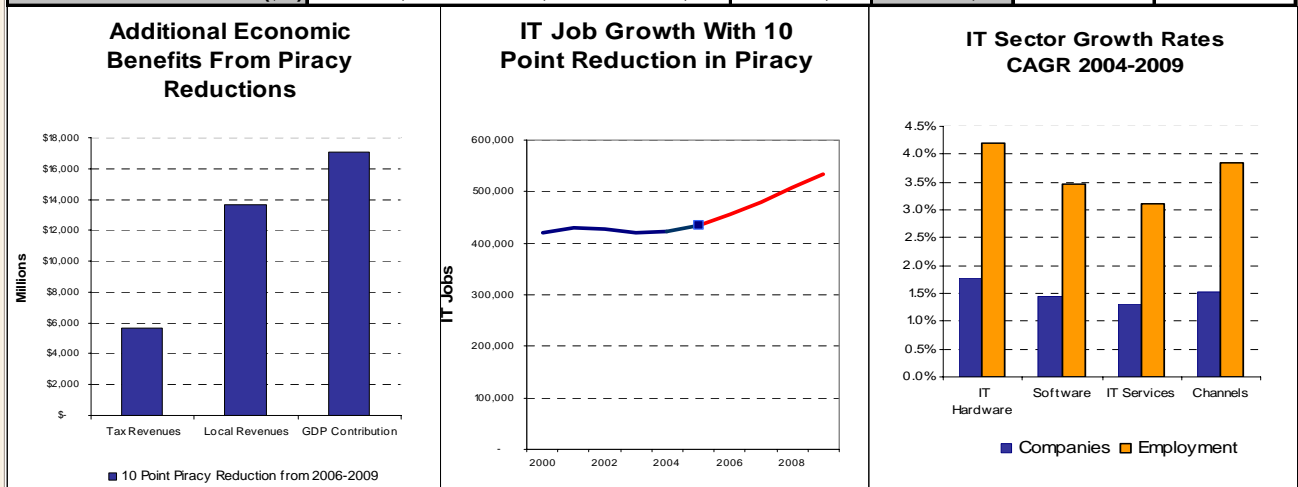
France is among the top ten beneficiaries in the global survey. Cutting France's piracy rate to 35 percent could add \$17 billion to its economy, create nearly 30,000 new jobs, and increase local industry sales by more than \$13.6 billion. For France's government, the cumulative effect of all this growth could mean an additional \$5.7 billion in tax revenues.

A Huge Potential for Economic Gains

Between 2000 and 2004, France's software sector grew 2.4 percent a year on average while growth in the broader IT sector stalled. Piracy reductions could help unleash unprecedented new growth and help France's IT sector grow 35 percent instead of 27 percent between 2004 and 2009 — generating 109,000 IT jobs in the process.

France's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 21,756	17,517	\$ 17,538	14,120	\$ 23,267	18,733	5.8%
Software	\$ 8,635	6,952	\$ 9,511	7,657	\$ 12,023	9,680	4.8%
IT Services	\$ 26,278	21,157	\$ 26,089	21,005	\$ 32,227	25,947	4.3%
Total IT Revenue	\$ 56,669	45,626	\$ 53,137	42,782	\$ 67,517	54,360	4.9%

France's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 83,774	\$ 80,422	\$ 101,330	\$ 108,223	\$17,074	26.0%	34.6%
Jobs	421,054	424,008	503,186	533,156	29,970	18.7%	25.7%
IT Tax Revenues (\$M)	\$ 50,167	\$ 53,358	\$ 68,213	\$ 70,520	\$5,701	27.8%	32.2%



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GERMANY

Germany's IT Sector Could Become a \$90-Billion Engine for Economic Opportunity

Strong demand for software has helped Germany's IT sector become a thriving \$68-billion sector — the fourth largest in the world. If Germany reduced its 29 percent software piracy rate by 10 points, the IT industry could grow to nearly \$90 billion by 2009, helping to unlock the creative potential of entrepreneurs and generating new high-wage jobs for Germany's workforce.

More to Gain than Most From Piracy Reductions

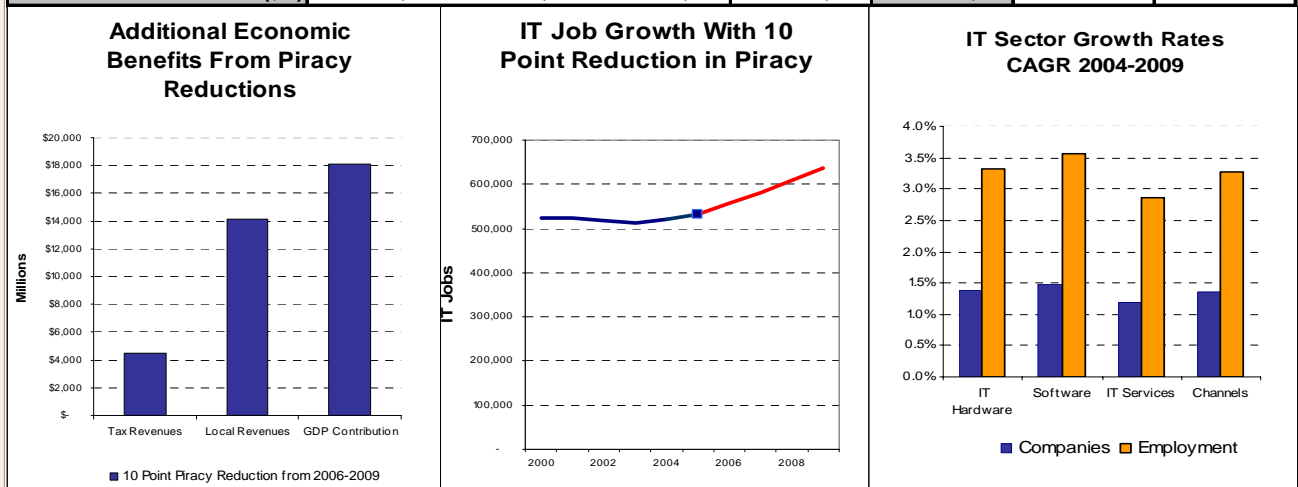
Cutting Germany's piracy rate from 29 percent to 19 percent could produce the European Union's second largest benefits, adding \$18 billion to its economy, increasing local industry revenues by more than \$14 billion, and pumping an additional \$4.5 billion into Germany's tax coffers. The 10-point reduction could also create nearly 30,000 new IT jobs, spreading those benefits to even more households.

Software Poised to Unleash New Economic Gains

With the strongest demand for software in the European Union, Germany's \$68-billion IT sector now consists of 78,000 businesses, employing 520,000 workers and generating \$56 billion a year in taxes. But the best is yet ahead. The software sector, set to lead IT sector growth, is now projected to grow 4.9 percent a year between 2004 and 2009. Further cuts in software piracy could leverage this growth to unleash unprecedented new economic opportunities.

Germany's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 34,280	27,600	\$ 23,989	19,315	\$ 30,074	24,213	4.6%
Software	\$ 14,092	11,346	\$ 14,891	11,989	\$ 18,949	15,256	4.9%
IT Services	\$ 26,794	21,572	\$ 28,935	23,297	\$ 35,137	28,290	4.0%
Total IT Revenue	\$ 75,166	60,518	\$ 67,816	54,601	\$ 84,160	67,760	4.4%

Germany's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 104,917	\$ 99,814	\$ 123,363	\$ 130,709	\$18,063	23.6%	31.0%
Jobs	524,778	519,890	606,038	635,636	29,598	16.6%	22.3%
IT Tax Revenues (\$M)	\$ 53,781	\$ 56,442	\$ 68,386	\$ 70,200	\$4,473	21.2%	24.4%



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GREECE

Greece's Emerging IT Sector Could Grow Nearly 60 Percent Larger — Producing the Fastest Growth in the Region

Historically hampered by high software piracy rates, Greece's IT sector stands to grow from \$2.1 billion today to \$3.4 billion by 2009 if the country can cut its 62-percent piracy rate by 10 points. A reduction of that size would help Greece unleash the creative potential of its entrepreneurs, who, in turn, could employ more workers in IT jobs.

Reducing Piracy Could Create Jobs and Boost the Economy

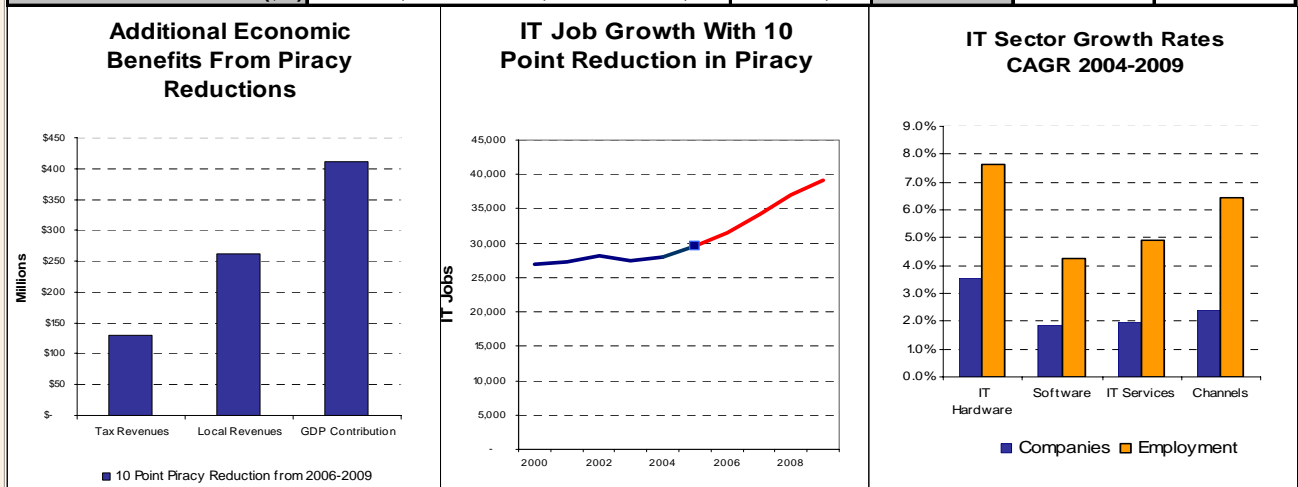
Decreasing Greece's piracy rate to 52 percent would add \$411 million to its economy, create 1,300 more jobs, and increase local industry revenues by more than \$261 million. That, in turn, would generate an additional \$130 million in tax revenue to help the Greek government pay for critical benefits and services.

Fast IT Sector Growth Promises Enormous Benefits

With the highest piracy rate in the European Union, Greece has the smallest IT sector as a percentage of its economy. Although its IT sector is still emerging, it packs enormous economic potential. By reducing its software piracy rate, Greece can accelerate its future IT sector growth — growing nearly 60 percent instead of 53 percent between 2004 and 2009.

Greece's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 1,445	1,164	\$ 1,155	930	\$ 1,914	1,541	10.6%
Software	\$ 200	161	\$ 224	181	\$ 299	241	5.9%
IT Services	\$ 711	572	\$ 749	603	\$ 1,041	838	6.8%
Total IT Revenue	\$ 2,356	1,897	\$ 2,129	1,714	\$ 3,254	2,620	8.9%

Greece's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 3,056	\$ 2,870	\$ 4,281	\$ 4,447	\$411	49.2%	54.9%
Jobs	26,885	27,957	37,754	39,118	1,364	35.0%	39.9%
IT Tax Revenues (\$M)	\$ 1,703	\$ 1,925	\$ 2,911	\$ 2,964	\$130	51.2%	54.0%



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IRELAND

Ireland's \$2.6 Billion IT Sector Could Grow 50 Percent Larger — Creating New Jobs and Opportunities

Piracy cuts have helped Ireland's IT sector grow into a \$2.6-billion domestic IT sector industry. Reducing Ireland's 38-percent piracy rate by 10 percentage points would help the industry grow to \$4 billion by 2009.

Reductions in Piracy Would Add Hundreds of Jobs, Millions in Tax Revenue

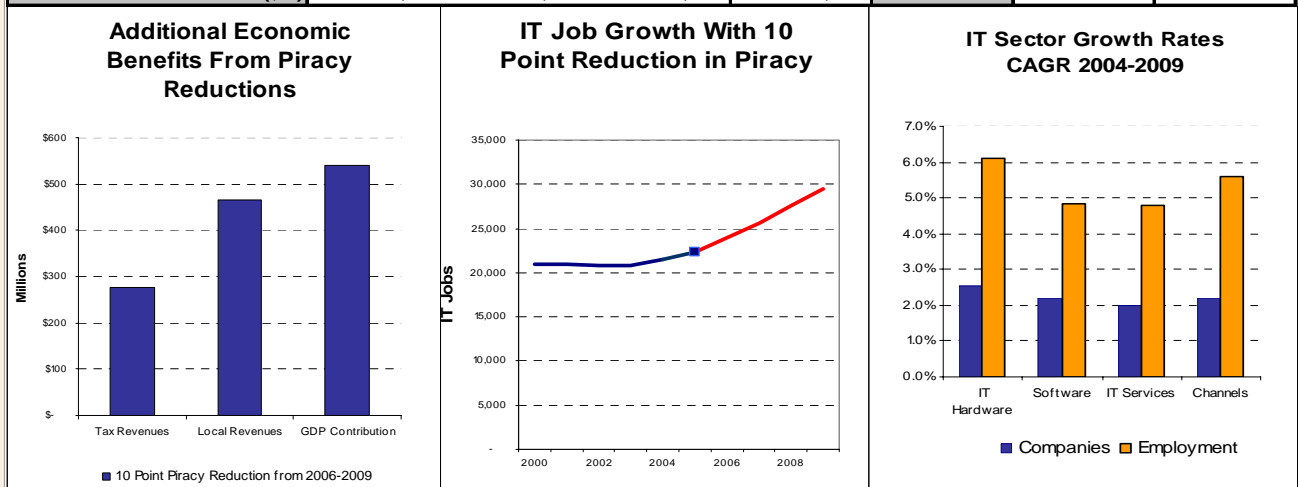
A 10-point drop in Ireland's piracy rate could create more than 1,800 new jobs and pump \$541 million into the economy. It could also boost local industry revenues by more than \$466 million and generate \$277 million in additional tax revenues.

Piracy Cuts Could Generate Fast Software Growth

Between 2000 and 2004, demand for software grew 12 percent. Strong software growth helped drive IT sector benefits — adding \$90 million in new software revenues alone to the economy and creating hundreds more IT jobs between 2000 and 2004. By further reducing its software piracy rate, Ireland could accelerate its future IT sector growth and see its software sector's expected 6.7-percent per-year growth increase significantly.

Ireland's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 1,848	1,488	\$ 1,269	1,022	\$ 1,902	1,531	8.4%
Software	\$ 358	288	\$ 401	323	\$ 555	447	6.7%
IT Services	\$ 698	562	\$ 986	794	\$ 1,360	1,095	6.6%
Total IT Revenue	\$ 2,904	2,338	\$ 2,657	2,139	\$ 3,817	3,073	7.5%

Ireland's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 3,747	\$ 3,785	\$ 5,374	\$ 5,595	\$541	42.0%	47.8%
Jobs	20,989	21,491	27,702	29,540	1,838	28.9%	37.5%
IT Tax Revenues (\$M)	\$ 2,105	\$ 2,483	\$ 3,605	\$ 3,718	\$277	45.2%	49.7%



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ITALY

Italy's IT Sector Could Become a \$38 Billion Engine for Economic Growth

Strong demand for software has already helped Italy's IT sector grow to \$27.5 billion. If Italy reduced its 50-percent software piracy rate by 10 points, the industry could grow to \$38 billion by 2009, creating new businesses, jobs, and opportunities.

Reducing Piracy Could Pump Billions Into the Economy

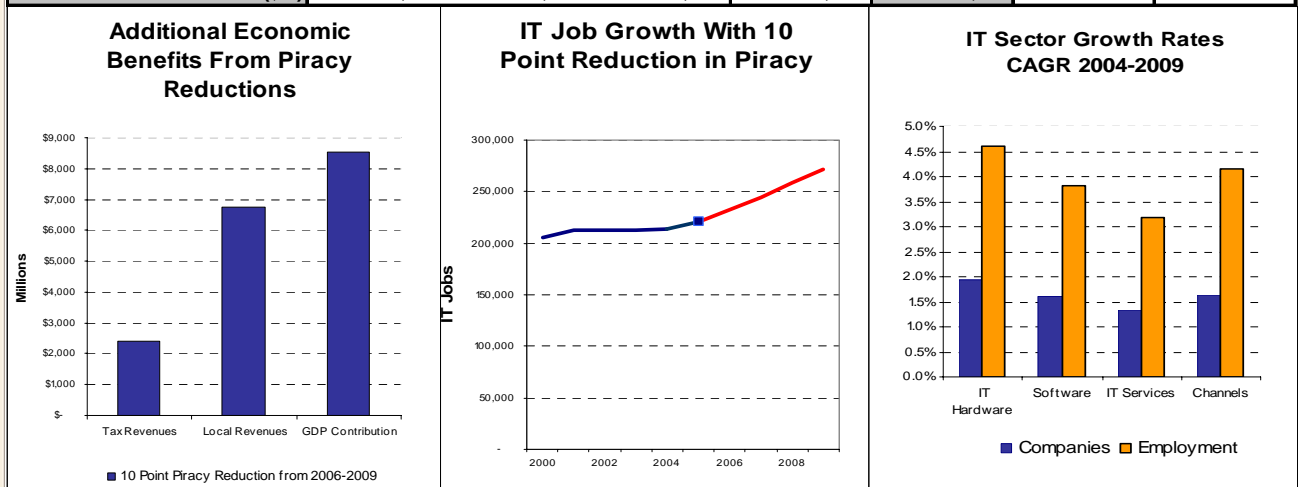
A 10-point drop in Italy's piracy rate could create nearly 15,000 jobs and pump \$8.5 billion into the economy. It could also increase local industry revenues by more than \$6.7 billion and generate \$2.4 billion in additional tax revenues.

Software Could Fuel Economic Expansion

With a high 50-percent software piracy rate, Italy could be among the top five greatest beneficiaries in the European Union from piracy reductions. Decreasing Italy's piracy rate to 40 percent would accelerate growth from 30 percent to 38 percent between 2004 and 2009 and help Italy's IT sector become a 270,000-employee economic powerhouse.

Italy's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 13,455	10,833	\$ 10,919	8,791	\$ 14,884	11,983	6.4%
Software	\$ 3,949	3,179	\$ 4,451	3,583	\$ 5,757	4,635	5.3%
IT Services	\$ 10,369	8,348	\$ 12,156	9,787	\$ 15,072	12,135	4.4%
Total IT Revenue	\$ 27,773	22,361	\$ 27,526	22,162	\$ 35,713	28,754	5.3%

Italy's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 38,684	\$ 40,246	\$ 51,581	\$ 55,038	\$8,534	28.2%	36.8%
Jobs	205,426	213,759	256,585	271,464	14,879	20.0%	27.0%
IT Tax Revenues (\$M)	\$ 22,923	\$ 23,608	\$ 29,679	\$ 30,659	\$2,421	25.7%	29.9%



* GDP contribution excludes impact from imports and exports and includes total value of channel revenues (not just mark-up).

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LUXEMBOURG

Luxembourg's IT Sector Is a Proven Economic Engine That Could Grow Into a Thriving, \$1.4-Billion Sector

Nurtured by low software piracy, Luxembourg's IT sector has already expanded into a \$990-million industry. With the help of a 10-point reduction in its 27-percent software piracy rate, Luxembourg's IT sector could grow to \$1.4-billion by 2006, creating hundreds of jobs and millions in benefits.

Economy Stands to Gain From a Drop in Piracy

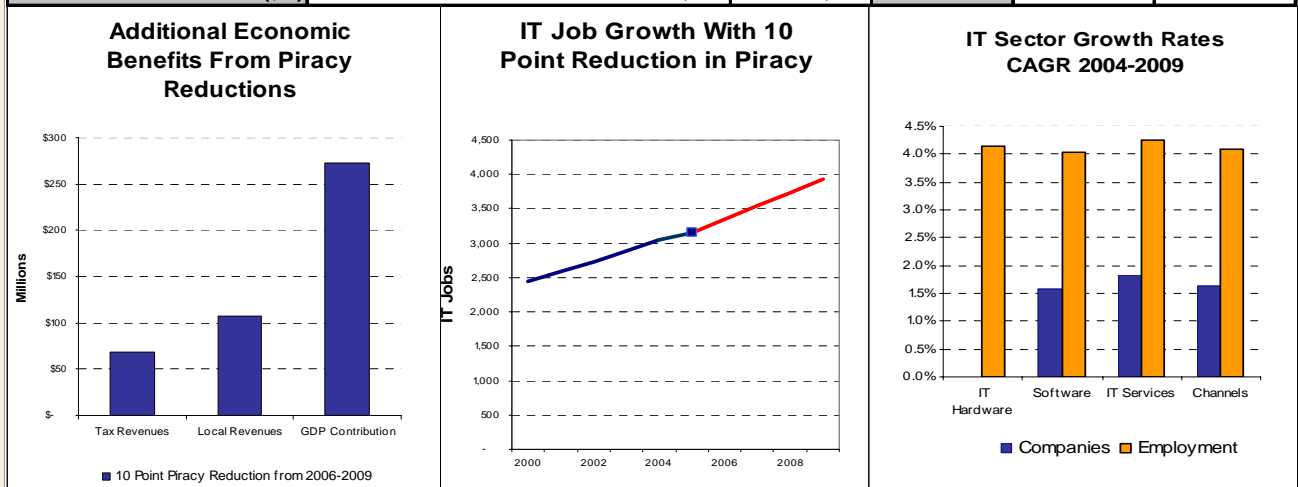
Decreasing Luxembourg's piracy rate to 17 percent would add \$273 million to its economy and increase local industry revenues by more than \$100 million. That, in turn, would generate an additional \$69 million in tax revenue to help the Luxembourg government pay for public benefits and services.

Software Is a Proven Engine for Luxembourg's Growth

With the help of a 27 percent piracy rate, Luxembourg's software sector was able to grow at a rate of 11.6 percent a year between 2000 and 2004. Strong software growth helped drive IT sector growth — adding \$147 million in new software revenues alone to the economy, and creating more than 600 new IT jobs over the same period. With a further 10-point cut in piracy, Luxembourg could accelerate its future IT sector growth — growing 40 percent instead of 32 percent between 2004 and 2009.

Luxembourg's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 320	258	\$ 336	271	\$ 444	358	5.7%
Software	\$ 142	115	\$ 221	178	\$ 289	233	5.5%
IT Services	\$ 280	225	\$ 432	348	\$ 576	464	5.9%
Total IT Revenue	\$ 743	598	\$ 990	797	\$ 1,309	1,054	5.8%

Luxembourg's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 526	\$ 734	\$ 972	\$ 1,084	\$273	32.5%	47.8%
Jobs	2,438	3,046	3,739	3,934	195	22.8%	29.1%
IT Tax Revenues (\$M)	\$ 745	\$ 976	\$ 1,303	\$ 1,331	\$69	33.5%	36.4%



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NETHERLANDS

The Netherlands' IT Sector Is a Proven Economic Engine That Could Add Thousand of Jobs and \$9 Billion to Its Economy

Strong software demand has helped the Netherlands grow its IT sector to \$16.5 billion in size. A further 10-point reduction in its 30-percent piracy rate could help the Netherlands' IT sector grow 38 percent, to \$22.9 billion a year.

Piracy Cuts Are a Recipe for Jobs and Tax Revenues

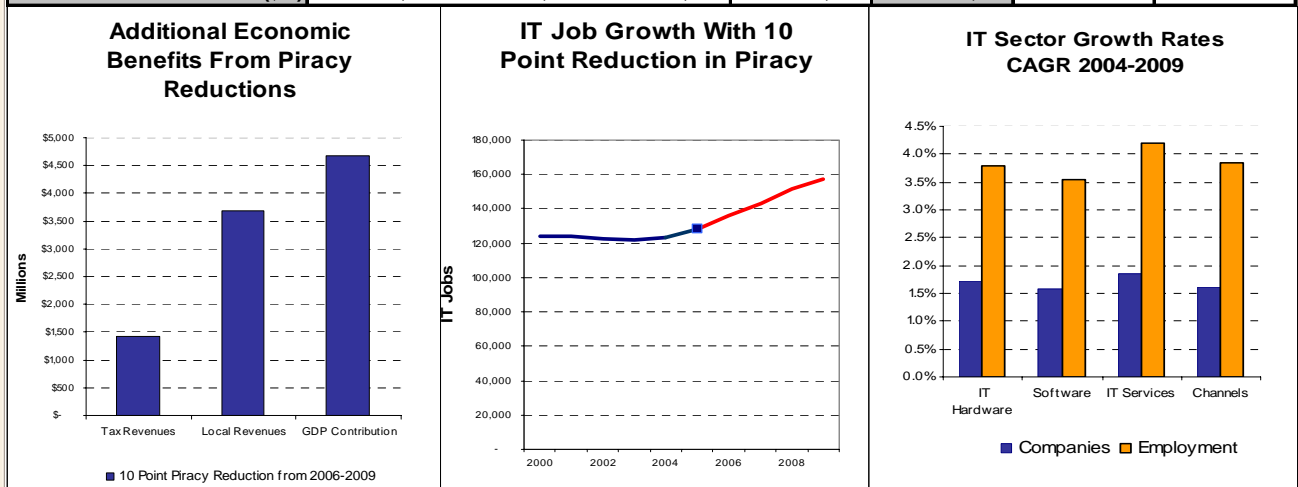
Among the top five largest beneficiaries from piracy cuts in the European Union, cutting the Netherlands' piracy rate from 30 percent to 20 percent could add \$4.7 billion to its economy, increase local industry revenues by more than \$3.7 billion, generate an additional \$1.4 billion in tax revenues, and create more than 7,000 new jobs.

Reducing Piracy Is a Proven Economic Strategy

Between 2000 and 2004, strong software demand helped drive IT sector growth including the addition of \$627 million in new software revenues alone. The Netherlands now has one of the largest software sectors as a portion of its IT sector in the global survey.

Netherlands's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 8,024	6,461	\$ 5,794	4,665	\$ 7,502	6,040	5.3%
Software	\$ 3,410	2,746	\$ 3,763	3,030	\$ 4,786	3,853	4.9%
IT Services	\$ 6,450	5,193	\$ 6,986	5,625	\$ 9,288	7,478	5.9%
Total IT Revenue	\$ 17,885	14,399	\$ 16,543	13,319	\$ 21,576	17,371	5.5%

Netherlands's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 25,054	\$ 24,335	\$ 31,850	\$ 33,758	\$4,678	30.9%	38.7%
Jobs	123,773	123,316	149,792	157,570	7,778	21.5%	27.8%
IT Tax Revenues (\$M)	\$ 16,833	\$ 17,542	\$ 22,898	\$ 23,479	\$1,417	30.5%	33.8%



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NORWAY

Lower Piracy and Software Growth Could Transform Norway's IT Sector Into a \$8.3 Billion Industry

Growth in the software and service industries has helped Norway's IT sector grow to \$6 billion. Reducing its 31-percent piracy rate to 21 percent by 2009 could help Norway's IT industry grow to \$8.3 billion, creating new high-wage jobs for its workers and new taxes for its government.

Dousing Piracy Could Fuel the Economy

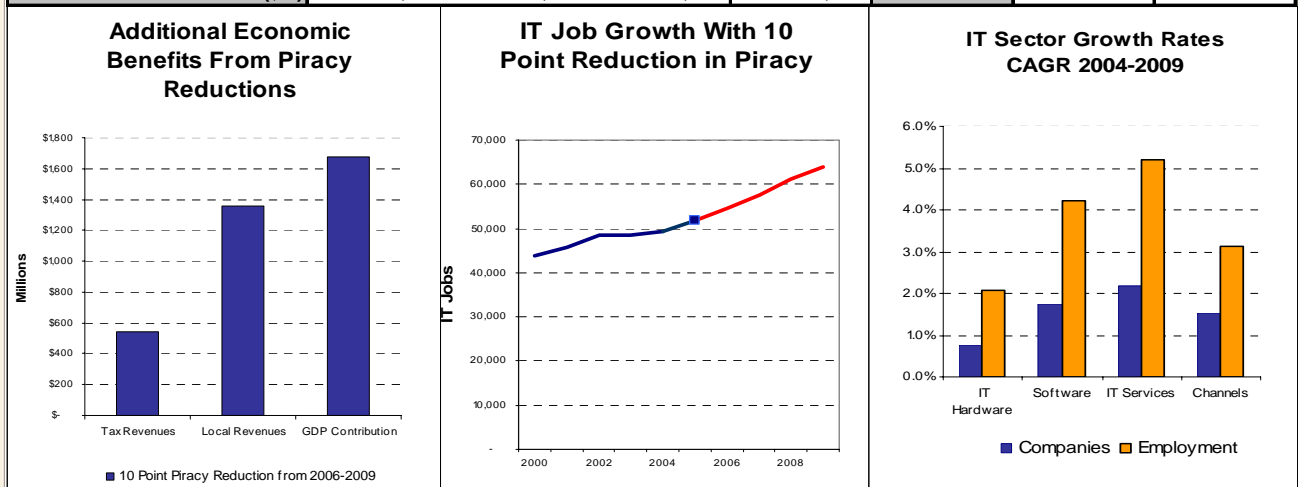
A 10-point drop in Norway's piracy rate to 21 percent could create more than 3,200 jobs and pump an additional \$1.7 billion into the economy. It could also increase local industry revenues by more than \$1.4 billion and generate \$543 million in additional tax revenues.

Software and IT Services Will Lead Growth and Add Jobs

Between 2000 and 2004, demand for software grew 11 percent. Strong software growth helped drive IT sector benefits — adding \$180 million in new software revenues alone to the economy and creating more than 5,600 new IT jobs between 2000 and 2004. Further reducing its piracy rate would help Norway generate 14,000 more jobs, create \$3.9 billion in additional tax revenues between now and 2009, and add \$5.2 billion to its IT-enabled economy by 2009.

Norway's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	NOK Millions	USD Millions	NOK Millions	USD Millions	NOK Millions	CAGR
IT Hardware	\$ 2,898	19,543	\$ 2,232	15,054	\$ 2,566	17,303	2.8%
Software	\$ 968	6,525	\$ 1,078	7,271	\$ 1,433	9,665	5.9%
IT Services	\$ 2,325	15,681	\$ 2,693	18,159	\$ 3,819	25,753	7.2%
Total IT Revenue	\$ 6,191	41,748	\$ 6,004	40,485	\$ 7,818	52,722	5.4%

Norway's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 8,671	\$ 8,858	\$ 11,829	\$ 12,518	\$1,678	33.5%	41.3%
Jobs	43,836	49,438	60,699	63,936	3,237	22.8%	29.3%
IT Tax Revenues (\$M)	\$ 3,749	\$ 4,359	\$ 6,027	\$ 6,253	\$543	38.3%	43.4%



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PORTUGAL

Portugal's Emerging IT Sector Could Grow 42 percent — Creating New Economic Opportunities, Jobs, and Tax Revenues

Cutting its piracy rate by 10 points would help Portugal's emerging \$2.7-billion IT sector grow to \$3.9 billion, creating new opportunities for entrepreneurs and new high-wage jobs for Portugal's workforce.

Less Piracy Could Mean More Opportunities

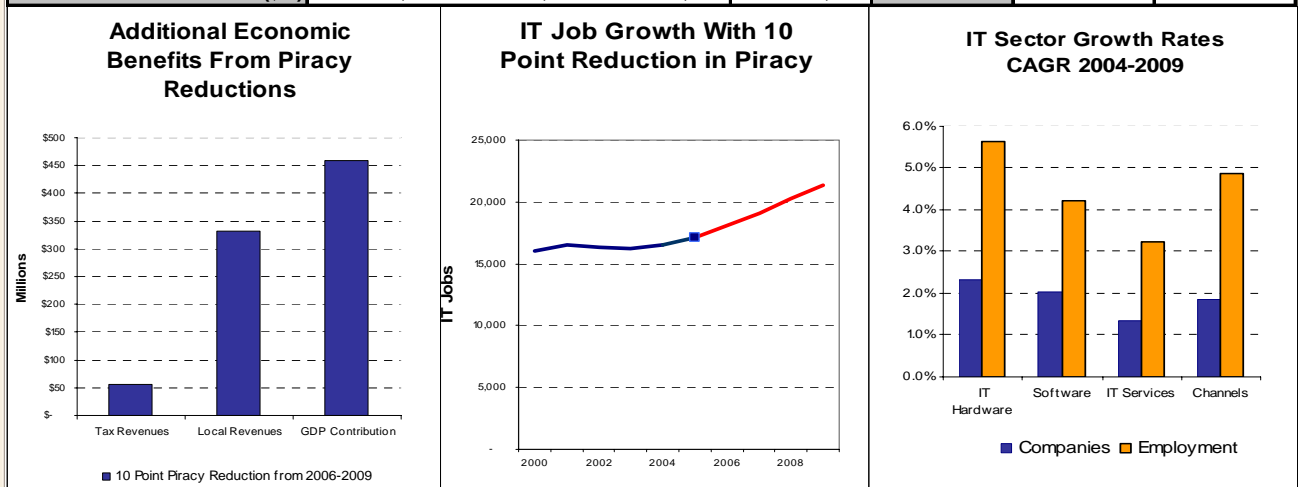
Portugal could add \$460 million to its economy, create more than 500 high-wage technology jobs, increase local industry revenues by \$331 million, and generate an additional \$56 million in tax revenues by decreasing the country's piracy rate from 40 percent to 30 percent.

An IT Sector Poised for Growth

Although still an emerging sector, Portugal's IT sector could soon see near-explosive growth. With the help of a 10-point cut in piracy, Portugal's IT sector could deliver faster IT growth. By growing its IT sector by 42 percent instead of 37 percent between 2004 and 2009, Portugal's IT sector could become a nearly \$4-billion, 21,000-employee engine for economic prosperity.

Portugal's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 1,850	1,490	\$ 1,492	1,201	\$ 2,176	1,752	7.8%
Software	\$ 317	255	\$ 358	288	\$ 475	382	5.8%
IT Services	\$ 734	591	\$ 890	717	\$ 1,107	892	4.5%
Total IT Revenue	\$ 2,901	2,336	\$ 2,740	2,206	\$ 3,758	3,026	6.5%

Portugal's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 3,657	\$ 3,648	\$ 4,897	\$ 5,084	\$460	34.2%	39.4%
Jobs	16,079	16,503	20,780	21,358	578	25.9%	29.4%
IT Tax Revenues (\$M)	\$ 1,322	\$ 1,351	\$ 1,787	\$ 1,810	\$56	32.3%	33.9%



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SPAIN

Spain's \$15 Billion IT Sector Could Grow 58% — Unlocking New Jobs and Opportunities

Fast software sector growth has helped Spain's IT sector grow to \$15 billion a year. If the country further reduced its 43-percent piracy rate by 10 points, its IT industry could grow to \$24 billion by 2009.

Reducing Piracy Could Grow High Tech Jobs

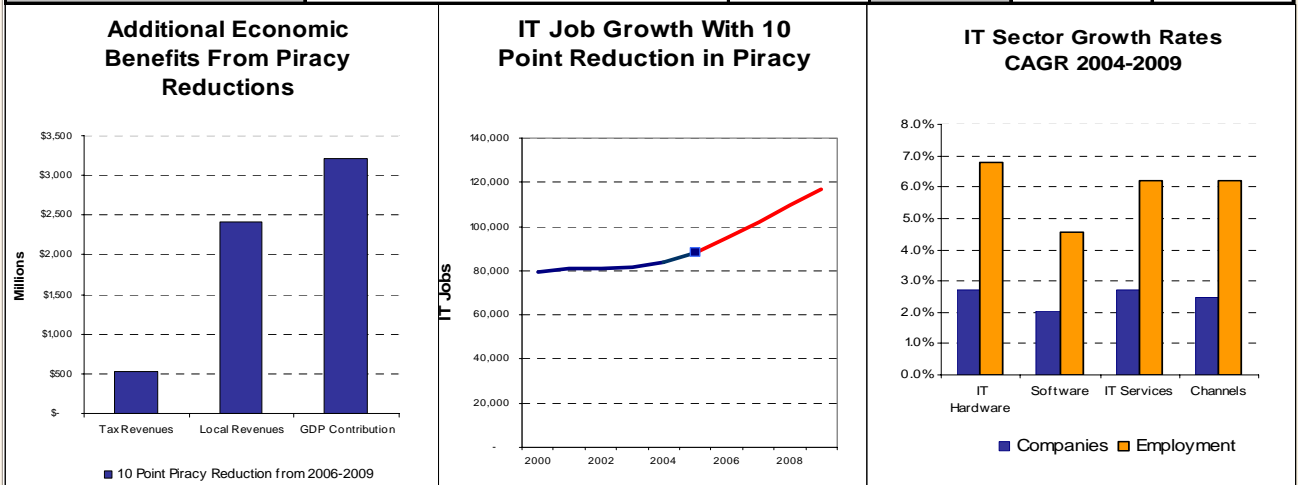
Cutting Spain's piracy rate to 33 percent could add \$3.2 billion to its economy, create 4,000 new jobs, and increase local industry sales by more than \$2.4 billion. For Spain's government, the cumulative effect of all this growth could mean an additional \$531 million in tax revenues.

Software Is an Engine for Economic Growth

Strong software demand has already helped Spain translate growth in its IT sector into tangible economic benefits — 4,200 new jobs since 2000, as the sector grew to \$15 billion a year. If Spain further reduced its 43-percent piracy rate by 10 points, Spain could gain another 33,000 high tech jobs by 2009.

Spain's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 7,093	5,711	\$ 6,980	5,620	\$ 10,954	8,819	9.4%
Software	\$ 1,881	1,514	\$ 2,188	1,761	\$ 2,979	2,399	6.4%
IT Services	\$ 4,353	3,505	\$ 5,858	4,717	\$ 8,854	7,129	8.6%
Total IT Revenue	\$ 13,328	10,730	\$ 15,026	12,098	\$ 22,787	18,346	8.7%

Spain's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 17,998	\$ 21,174	\$ 31,947	\$ 33,264	\$3,212	50.9%	57.1%
Jobs	79,349	83,624	112,781	116,860	4,079	34.9%	39.7%
IT Tax Revenues (\$M)	\$ 10,385	\$ 11,553	\$ 15,871	\$ 16,086	\$531	37.4%	39.2%



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SWEDEN

Sweden's Thriving IT Sector Could Grow to \$15 Billion and Create Another 21,000 High Tech Jobs

Nurtured by the second lowest piracy rate in the European Union, Sweden's IT sector has grown into a \$12-billion industry employing 100,000 workers. If the country reduced its 26-percent software piracy rate by 10 points, the sector could become a \$15.5-billion powerhouse employing more than 122,000 employees by 2009.

Fighting Piracy Could Generate 1.5 Billion in Taxes for Public Services

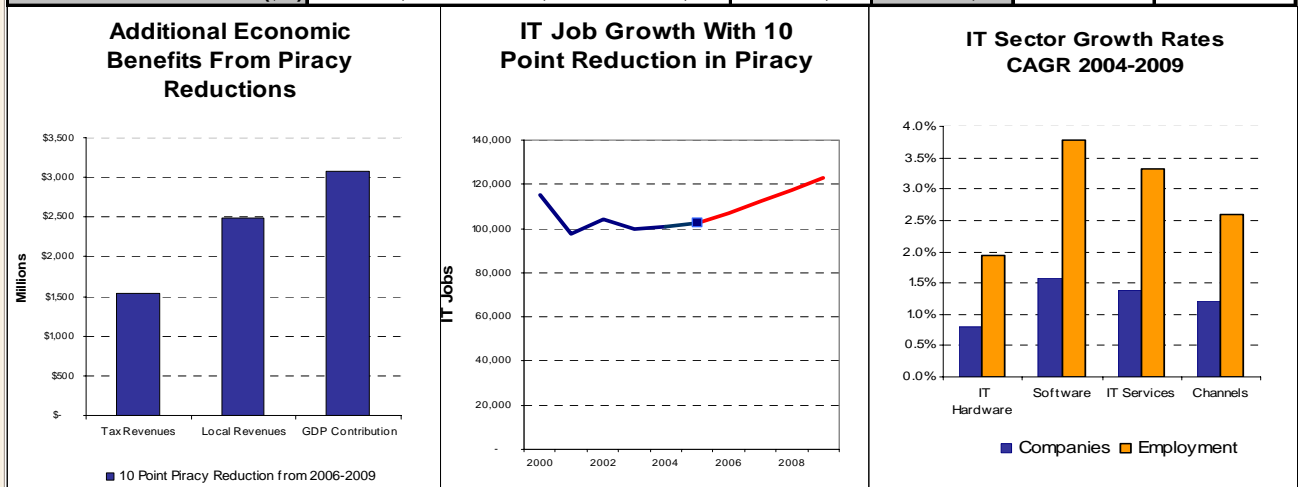
Cutting Sweden's piracy rate from 26 percent to 16 percent could add nearly \$3 billion to its economy, increase local industry revenues by roughly \$2.5 billion, and generate an additional \$1.5 billion in tax revenues. Piracy cuts would also create nearly 6,000 new jobs, which, combined with an already growing IT sector, means 21,000 more IT jobs in the next four years.

Piracy Reductions Are a Proven Stimulant for Economic Gains

Low software piracy has already helped Sweden translate IT growth into tangible economic benefits. Between 2000 and 2004, Sweden's software sector grew 18 percent. Now Sweden benefits from the largest IT sector as a percentage of its economy in the European Union — with more than 16,000 businesses employing more than 100,000 people and generating \$16 billion a year in taxes.

Sweden's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	SEK Millions	USD Millions	SEK Millions	USD Millions	SEK Millions	CAGR
IT Hardware	\$ 6,119	44,975	\$ 4,055	29,804	\$ 4,631	34,037	2.7%
Software	\$ 1,869	13,739	\$ 2,201	16,178	\$ 2,843	20,894	5.2%
IT Services	\$ 5,340	39,251	\$ 5,737	42,166	\$ 7,179	52,764	4.6%
Total IT Revenue	\$ 13,329	97,965	\$ 11,993	88,148	\$ 14,653	107,696	4.1%

Sweden's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 18,883	\$ 18,037	\$ 22,251	\$ 23,512	\$3,074	23.4%	30.4%
Jobs	114,997	101,041	116,671	122,652	5,981	15.5%	21.4%
IT Tax Revenues (\$M)	\$ 15,702	\$ 16,523	\$ 20,574	\$ 21,206	\$1,537	24.5%	28.3%



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SWITZERLAND

Switzerland's Booming IT Sector Could Create Another 22,000 High Tech Jobs and Fuel Broader Economic Gains

Driven by the largest software sector as a portion of its IT sector and the largest IT sector as a portion of its GDP among all non-EU European countries, Switzerland's IT sector has already become an \$11.7 billion industry employing 97,000 workers. With the help of a further 10-point reduction in its 28-percent software piracy rate, it could grow to \$15.3 billion by 2009, creating another 22,000 high tech jobs in the process.

Less Piracy Could Boost the IT Sector

Decreasing Switzerland's piracy rate to 18 percent would help it achieve the second greatest benefits among non-EU European countries.

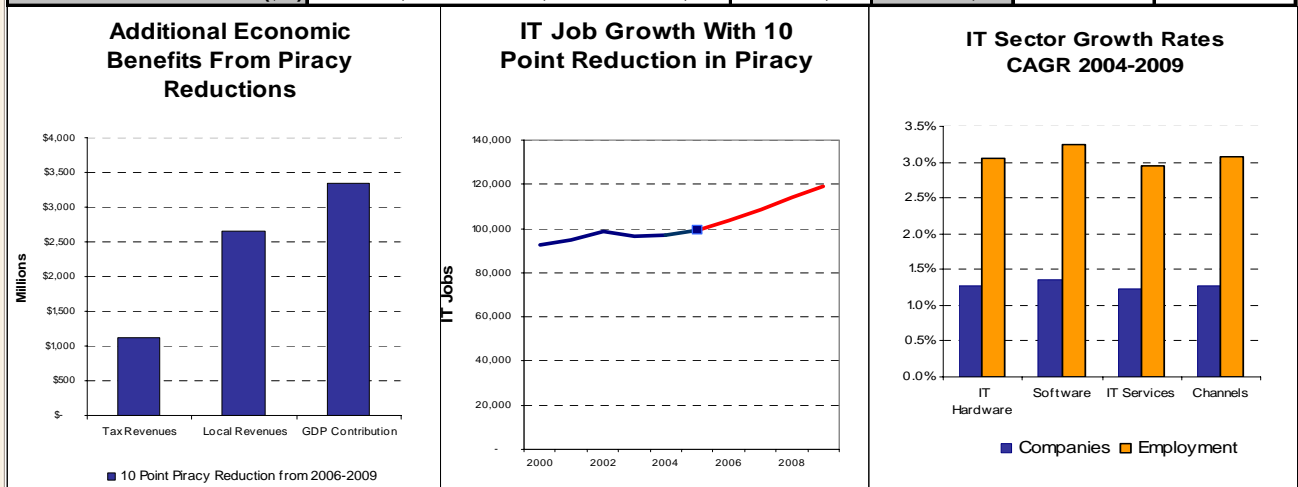
This 10-point cut could help it add \$3.3 billion to its economy, create 6,000 more new jobs, increase local industry revenues by more than \$2.6 billion, and generate an additional \$1.1 billion in tax revenue.

IT Sector Promises Impressive Growth

Switzerland is already enjoying the benefits of lower-than-average piracy and a vibrant IT sector. Between 2000 and 2004, demand for software grew 8 percent. Strong software growth helped drive IT sector benefits — creating more than 4,700 new IT jobs between 2000 and 2004. By further reducing its software piracy rate, Switzerland could accelerate its future IT sector growth — growing 31 percent instead of 23 percent between 2004 and 2009.

Switzerland's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	CHF Millions	USD Millions	CHF Millions	USD Millions	CHF Millions	CAGR
IT Hardware	\$ 5,717	7,105	\$ 3,930	4,884	\$ 4,836	6,011	4.2%
Software	\$ 2,483	3,086	\$ 2,674	3,324	\$ 3,332	4,141	4.5%
IT Services	\$ 4,469	5,554	\$ 5,095	6,333	\$ 6,226	7,738	4.1%
Total IT Revenue	\$ 12,669	15,746	\$ 11,699	14,541	\$ 14,395	17,890	4.2%

Switzerland's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 17,684	\$ 17,355	\$ 21,331	\$ 22,687	\$3,340	22.9%	30.7%
Jobs	92,483	97,252	112,913	118,945	6,032	16.1%	22.3%
IT Tax Revenues (\$M)	\$ 11,158	\$ 11,876	\$ 14,601	\$ 15,057	\$1,120	22.9%	26.8%



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UNITED KINGDOM

United Kingdom's IT Sector Is a Proven Economic Driver That Could Grow to \$95 Billion

Comparatively low software piracy has already helped the United Kingdom translate growth in its IT sector into tangible economic benefits — adding almost 12,000 new jobs since 2000, as the sector grew to nearly \$70 billion a year. If the United Kingdom reduced its 27-percent piracy rate by another 10 points, its IT sector could grow to \$95 billion by 2009.

UK to See the European Union's Largest Benefits From Piracy Cuts

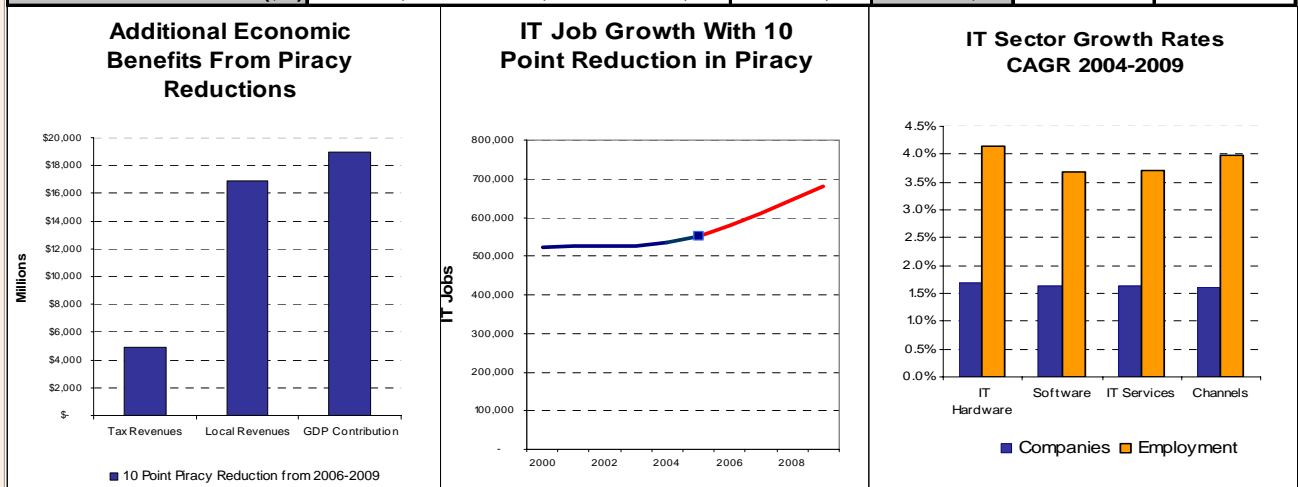
Decreasing the United Kingdom's piracy rate to 17 percent would generate the largest economic benefits in all of the European Union. A 10-point piracy drop would add nearly \$19 billion to its economy, create nearly 34,000 new jobs, increase local industry revenues by \$16.8 billion, and generate an additional \$4.9 billion in tax revenues.

IT Growth Is a Tool for Expanding British Opportunity

The U.K has long benefited from the high software demand that accompanies lower piracy. For example, low piracy coupled with strong software and service growth have helped expand British opportunity — adding \$8 billion to the economy and creating more than 11,000 new IT jobs between 2000 and 2004. By further reducing its software piracy rate, the United Kingdom could grow its IT sector by 37 percent instead of 30 percent between 2004 and 2009 and add 145,000 more high tech jobs by 2009.

United Kingdom's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	GBP Millions	USD Millions	GBP Millions	USD Millions	GBP Millions	CAGR
IT Hardware	\$ 27,430	14,978	\$ 22,360	12,210	\$ 29,594	16,160	5.8%
Software	\$ 11,852	6,472	\$ 13,286	7,255	\$ 17,043	9,306	5.1%
IT Services	\$ 28,367	15,490	\$ 33,672	18,387	\$ 43,287	23,637	5.2%
Total IT Revenue	\$ 67,649	36,940	\$ 69,318	37,851	\$ 89,924	49,103	5.3%

United Kingdom's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 109,892	\$ 117,894	\$ 152,429	\$ 160,146	\$18,936	29.3%	35.8%
Jobs	522,853	534,718	645,739	679,613	33,874	20.8%	27.1%
IT Tax Revenues (\$M)	\$ 40,918	\$ 45,103	\$ 59,498	\$ 61,520	\$4,938	31.9%	36.4%



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AUSTRALIA

Australia's Vibrant IT Sector Could Grow by 30 percent — Becoming a 200,000-Employee, \$25-Billion Economic Engine

Comparatively low software piracy and a thriving software sector have combined to help propel Australia's IT sector into a \$19 billion a year industry. Reducing its 32 percent piracy rate to 22 percent by 2009 could help the industry grow to \$25 billion a year, producing new growth for the economy, opportunities for businesses, jobs for workers, and tax revenues for the government.

Fighting Piracy Could Boost the Economy by \$4.7 Billion

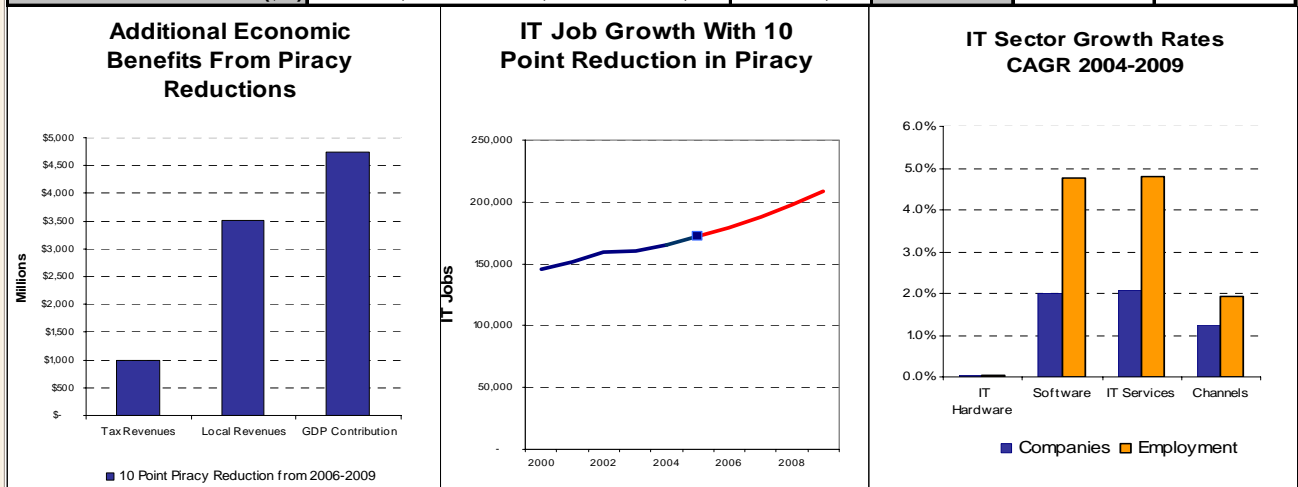
A 10-point drop in Australia's piracy rate could create nearly 10,000 jobs and pump \$4.7 billion into the economy. It could also increase local industry revenues by more than \$3.5 billion and generate nearly \$1 billion in additional tax revenues.

An IT Sector Already Delivering on Its Promise

Australia's 32-percent piracy rate — lower than most in the Asia-Pacific Region — has already helped the country accumulate significant economic benefits. Strong demand for software has helped the IT sector become a full 3.1 percent of the country's economy with jobs for 165,000 Australians. Now Australia's software and services sectors are projected to lead future IT growth and keep pumping benefits into the economy as the IT sector grows by 30 percent over the next four years with the help of further piracy cuts.

Australia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	AUD Millions	USD Millions	AUD Millions	USD Millions	AUD Millions	CAGR
IT Hardware	\$ 8,543	11,617	\$ 7,903	10,747	\$ 7,923	10,773	0.0%
Software	\$ 3,207	4,361	\$ 2,897	3,939	\$ 4,029	5,479	6.8%
IT Services	\$ 6,147	8,358	\$ 8,253	11,222	\$ 11,498	15,635	6.9%
Total IT Revenue	\$ 17,897	24,336	\$ 19,053	25,907	\$ 23,450	31,886	4.2%

Australia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 24,071	\$ 27,059	\$ 34,604	\$ 36,593	\$4,736	27.9%	35.2%
Jobs	145,587	165,177	199,183	208,955	9,772	20.6%	26.5%
IT Tax Revenues (\$M)	\$ 7,123	\$ 8,283	\$ 10,809	\$ 11,228	\$988	30.5%	35.6%



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CHINA

China Has the Most to Gain From Reducing Piracy; Could Triple the Benefits From Its IT Sector, Creating 1.8 Million More IT Jobs

Ferocious demand for software has helped fuel growth in China's emerging IT sector, but much of this new demand is being sapped by one of the world's highest piracy rates. Cutting China's software piracy from 90 percent to 80 percent could help unlock its IT sector's potential and transform China's \$27-billion IT sector into an engine for an additional \$87 billion of economic growth by 2009.

Cutting Piracy Is a Formula for Massive New Economic Gains

With the potential to achieve the largest relative benefits in the global study, cutting China's piracy rate to 80 percent would add \$87 billion to its economy, create 1.8 million more IT jobs, and increase local industry revenues by more than \$67 billion. That, in turn, would generate an additional \$6.5 billion in tax revenue to help China's government pay for necessary public benefits and services.

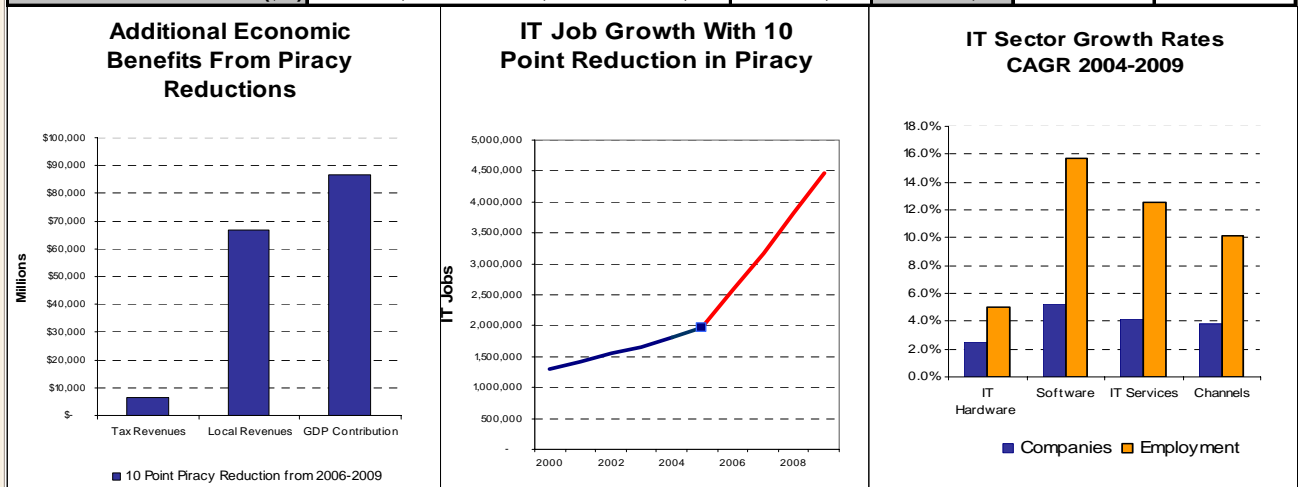
Could Create as Many IT Jobs in Four Years as the United States Has Created in 30

A new breed of entrepreneurial Chinese

businesses are emerging to take advantage of strong software demand and create new businesses, jobs, and tax benefits. Between 2000 and 2004, demand for software in China grew an astounding 88 percent. This strong software growth helped boost IT sector gains — adding three billion dollars to the economy in software alone and creating more than half a million additional IT jobs between 2000 and 2004. With the help of piracy cuts, China could create 2.6 million new IT jobs by 2009 — as many IT jobs as the United States has been able to create through 30 years of IT leadership. China's potential for continued growth, though strong, remains hampered by sky-high piracy rates.

China's IT Sector							Growth
	2000		2004		2009		2004-2009
Revenue **	USD Millions	CNY Millions	USD Millions	CNY Millions	USD Millions	CNY Millions	CAGR
IT Hardware	\$ 15,404	127,659	\$ 20,409	169,135	\$ 32,899	272,642	10.0%
Software	\$ 1,497	12,404	\$ 2,812	23,300	\$ 7,025	58,214	20.1%
IT Services	\$ 1,946	16,126	\$ 4,299	35,626	\$ 11,071	91,750	20.8%
Total IT Revenue	\$ 18,847	156,189	\$ 27,520	228,061	\$ 50,995	422,606	13.1%

China's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 21,197	\$ 33,524	\$ 69,336	\$ 105,810	\$86,740	106.8%	215.6%
Jobs	1,295,797	1,820,116	2,678,312	4,477,401	1,799,089	47.2%	146.0%
IT Tax Revenues (\$M)	\$ 1,406	\$ 2,072	\$ 3,872	\$ 6,622	\$6,535	86.8%	219.5%



* GDP contribution excludes impact from imports and exports and includes total value of channel revenues (not just mark-up).
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HONG KONG

Hong Kong Could Generate 10,000 More IT Jobs and Add \$1.3 Billion to Its Economy

With the innovation and entrepreneurship that comes from 8,000 IT businesses, Hong Kong's \$3.3 billion IT sector could grow to \$4.2 billion by 2009 with the help of piracy cuts. Reducing its 52-percent piracy rate by 10 percentage points could further fuel the creative potential of its IT sector — creating new jobs, businesses, and taxes for the territory.

Battling Piracy Could Fuel the Economy

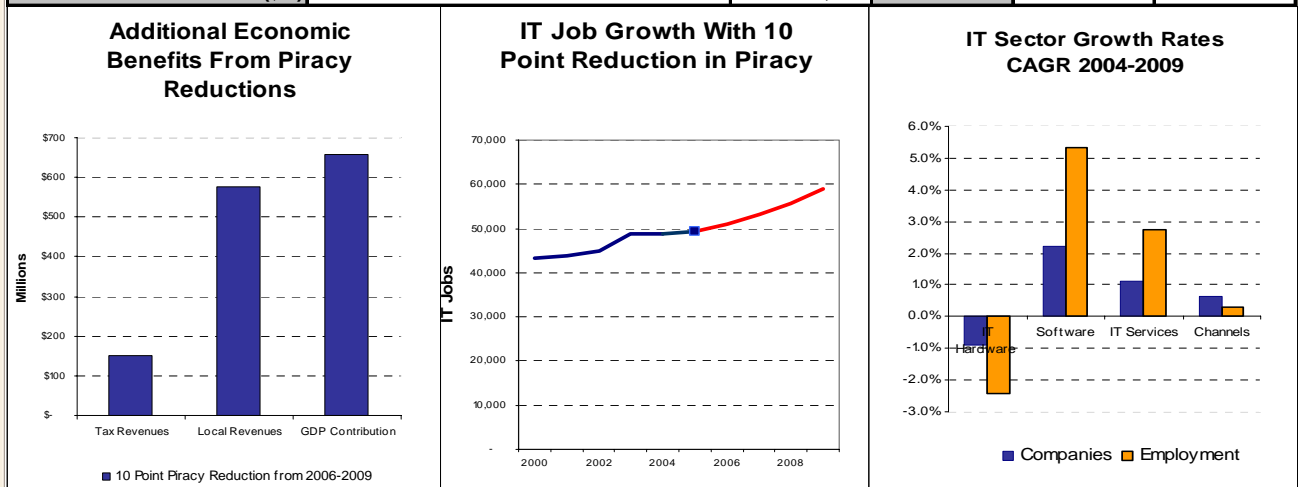
Hong Kong could add \$650 million to its economy, create 4,600 high-wage technology jobs, increase local industry revenues by \$575 million, and generate an additional \$150 million in tax revenues by decreasing the piracy rate from 52 percent to 42 percent.

Software Will Drive IT Economic Acceleration

Hong Kong is now benefiting from an IT sector that already employs nearly 50,000 people in high-wage IT jobs and generates almost \$800 million a year in taxes. With the software sector now poised to grow nearly twice as fast as either the hardware or services sector in coming years, the intellectual property rights of software publishers will become even more important. In fact, Hong Kong's IT sector now has the potential to generate 10,000 more IT jobs and grow by one-third in coming years, with the help of a 10-point cut in its piracy rate.

Hong Kong's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	HKD Millions	USD Millions	HKD Millions	USD Millions	HKD Millions	CAGR
IT Hardware	\$ 2,336	18,197	\$ 1,920	14,957	\$ 2,231	17,378	3.0%
Software	\$ 466	3,632	\$ 413	3,220	\$ 590	4,594	7.4%
IT Services	\$ 624	4,862	\$ 950	7,399	\$ 1,145	8,916	3.8%
Total IT Revenue	\$ 3,427	26,692	\$ 3,284	25,576	\$ 3,966	30,889	3.8%

Hong Kong's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 4,734	\$ 4,981	\$ 6,054	\$ 6,330	\$656	21.5%	27.1%
Jobs	43,135	48,832	54,242	58,904	4,662	11.1%	20.6%
IT Tax Revenues (\$M)	\$ 629	\$ 795	\$ 993	\$ 1,056	\$150	25.0%	32.9%



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INDIA

India's Dynamic IT Sector Could Nearly Triple — Creating 364,000 IT Jobs in the Process

Nurtured by an innovative workforce and strong software growth, India's IT sector has already expanded into a \$7.4-billion industry — even without counting its lucrative software and services exports. The sector could grow to \$19.5 billion, with the help of a 10-point reduction in its 74-percent software piracy rate.

More to Gain Than Most From Piracy Reductions

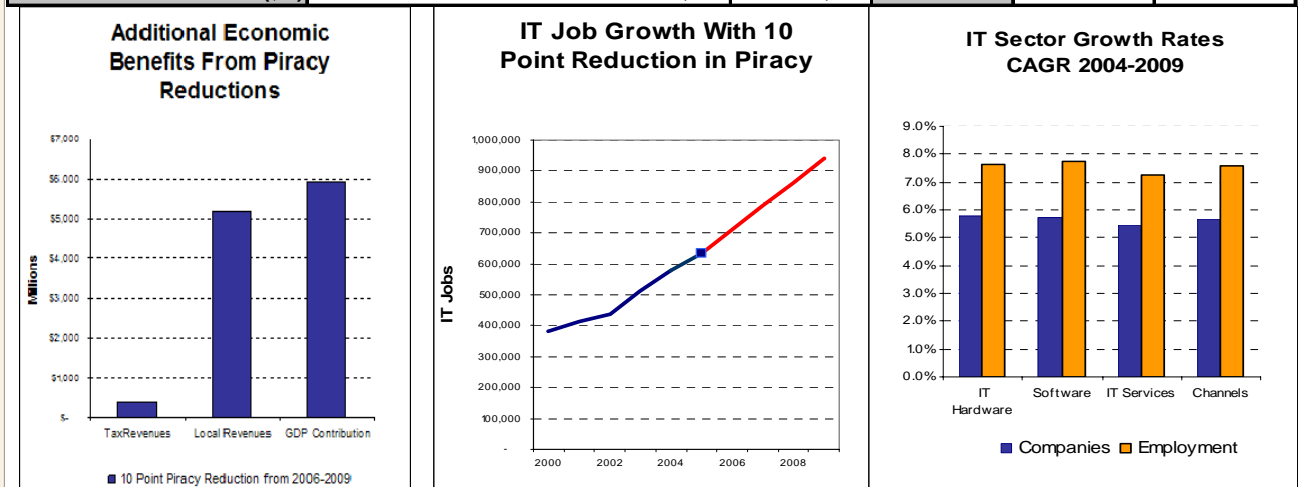
Among the top beneficiaries in the Asia-Pacific region, a 10-point drop in India's piracy rate could create 115,000 new IT jobs and pump \$5.9 billion into its economy. It could also increase local industry revenues by more than \$5 billion and generate \$386 million in additional tax revenues.

An IT Sector Poised for Fast Growth

Although already benefiting from the jobs, taxes, and economic growth that come from a fast-growing software sector, India is now positioned to benefit even more from the second-fastest-growing IT sector in the global survey. By reducing its growth-inhibiting 74-percent software piracy rate, India could accelerate its future growth potential — growing 165 percent instead of 137 percent between 2004 and 2009. This faster growth could help India generate 364,000 more jobs, create \$1.1 billion a year in extra tax revenues, and add \$30 billion a year to an already booming IT-enabled economy.

India's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	INR Millions	USD Millions	INR Millions	USD Millions	INR Millions	CAGR
IT Hardware	\$ 3,231	146,484	\$ 4,331	196,354	\$ 10,361	469,778	19.1%
Software	\$ 494	22,378	\$ 762	34,527	\$ 1,847	83,762	19.4%
IT Services	\$ 1,119	50,741	\$ 2,285	103,606	\$ 5,247	237,908	18.1%
Total IT Revenue	\$ 4,844	219,603	\$ 7,377	334,487	\$ 17,456	791,448	18.8%

India's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 11,901	\$ 21,040	\$ 49,031	\$ 51,676	\$5,951	133.0%	145.6%
Jobs	383,465	577,586	825,397	941,244	115,847	42.9%	63.0%
IT Tax Revenues (\$M)	\$ 220	\$ 350	\$ 1,106	\$ 1,276	\$386	216.1%	264.8%



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INDONESIA

Indonesia's Emerging IT Sector Could Grow Twice as Fast — Adding \$2.6 Billion to Its \$1.6-Billion IT Sector With Piracy Reductions

Growing demand for software has helped Indonesia's emerging IT sector deliver the jobs, taxes and business that come from a fast growing \$1.6 billion a year industry. If the country reduced its 87-percent piracy rate by another 10 points, its IT industry could grow to more than \$4.2 billion by 2009.

Piracy Reductions Could Catapult Indonesia Into the Information Age

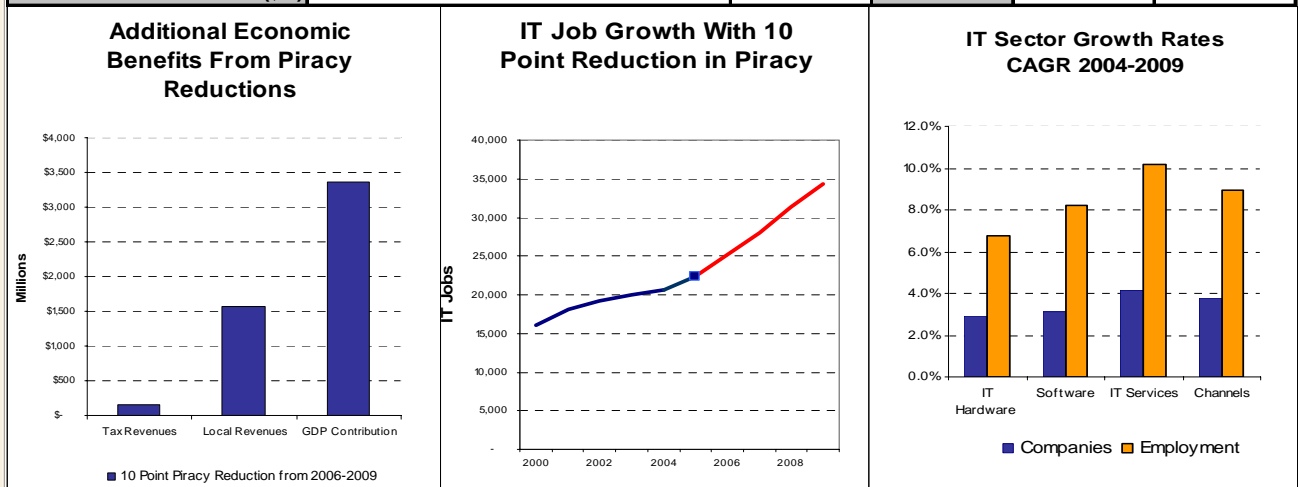
Still claiming one of the highest piracy rates in the region, Indonesia could enjoy some of the most substantial benefits from piracy reduction. Decreasing Indonesia's piracy rate to 77 percent would add \$3.4 billion to its economy, create 3,000 more new jobs, and increase local industry revenues by more than \$1.5 billion. These benefits would, in turn, generate an additional \$153 million for its tax coffers.

Huge Potential for Faster and Larger Economic Benefits

High piracy has worked to keep Indonesia's IT sector small — resulting in the smallest IT sector in the region. However between 2000 and 2004, demand for software grew an astounding 34 percent, helping generate the fastest IT sector growth in the region. This strong IT growth helped deliver critical benefits to Indonesians — adding \$714 million a year to the economy, and creating more than 4,600 new IT jobs between 2000 and 2004. By further reducing its software piracy rate, Indonesia could deliver IT benefits nearly twice as fast — growing 152 percent instead of the projected 79 percent between 2004 and 2009.

Indonesia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	IDR Millions	USD Millions	IDR Millions	USD Millions	IDR Millions	CAGR
IT Hardware	\$ 793	7,091,940	\$ 1,300	11,632,147	\$ 2,312	20,681,095	12.2%
Software	\$ 118	1,052,874	\$ 158	1,409,761	\$ 270	2,414,059	11.4%
IT Services	\$ 133	1,189,388	\$ 215	1,924,565	\$ 417	3,733,227	14.2%
Total IT Revenue	\$ 1,043	9,334,202	\$ 1,673	14,966,472	\$ 2,999	26,828,381	12.4%

Indonesia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,192	\$ 1,906	\$ 3,442	\$ 4,761	\$3,369	80.6%	149.8%
Jobs	16,044	20,706	31,182	34,278	3,096	50.6%	65.5%
IT Tax Revenues (\$M)	\$ 114	\$ 157	\$ 282	\$ 342	\$153	80.4%	118.6%



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JAPAN

Japan's IT Sector Could Potentially Become a \$124-Billion, 1-Million Employee Engine for Economic Opportunity

Strong software demand has helped Japan's IT sector grow into a \$100 billion thriving industry — the largest in the Asia-Pacific region. Reducing Japan's 28-percent piracy rate by another 10 percentage points would help the industry grow to \$124 billion by 2009.

Less Piracy Could Mean Even More Jobs

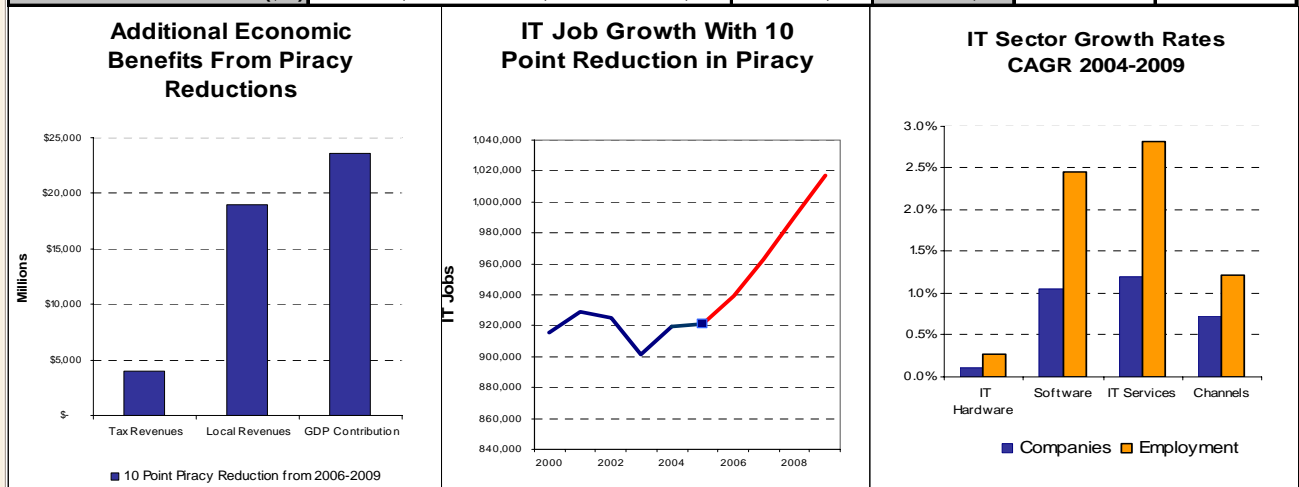
A further 10-point drop in Japan's piracy rate could create nearly 35,000 high tech jobs and pump roughly \$24 billion into the economy — the third largest benefit in the global survey. It could also increase local industry revenues by \$19 billion and generate nearly \$4 billion in additional tax revenues.

Lowering Piracy and Growing IT Benefits Go Hand in Hand

Long fostered by continual piracy cuts, Japan's IT sector has now become the largest IT sector in the region. Japan's IT sector now supports 137,000 IT businesses, employing nearly 920,000 people and generating almost \$90 billion a year in taxes. With the help of further piracy cuts, Japan's IT sector could grow 20 percent instead of 13 percent. This faster growth could help add another 100,000 high tech jobs for a total of more than 1 million Japanese IT jobs by 2009.

Japan's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	JPY Millions	USD Millions	JPY Millions	USD Millions	JPY Millions	CAGR
IT Hardware	\$ 58,872	6,368,415	\$ 43,106	4,662,995	\$ 43,968	4,756,248	0.4%
Software	\$ 16,511	1,786,017	\$ 17,974	1,944,356	\$ 21,356	2,310,138	3.5%
IT Services	\$ 37,504	4,057,012	\$ 42,320	4,577,952	\$ 51,537	5,574,967	4.0%
Total IT Revenue	\$ 112,887	12,211,443	\$ 103,401	11,185,303	\$ 116,861	12,641,353	2.5%

Japan's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 160,540	\$ 155,646	\$ 179,765	\$ 189,365	\$23,624	15.5%	21.7%
Jobs	915,453	919,348	982,021	1,016,906	34,885	6.8%	10.6%
IT Tax Revenues (\$M)	\$ 86,398	\$ 89,436	\$ 106,315	\$ 107,950	\$3,986	18.9%	20.7%



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KOREA

Korea's \$12-Billion IT Sector Could Grow by Nearly 50 Percent — Creating Another 133,000 High-Tech Jobs

Reducing software piracy from its current 46 percent to 36 percent could help Korea's IT sector grow from \$12.5 billion today to \$18.5 billion by 2009, creating new opportunities for entrepreneurs and new jobs for Korea's workforce.

Controlling Piracy Can Stimulate Growth, Jobs, and Tax Revenues

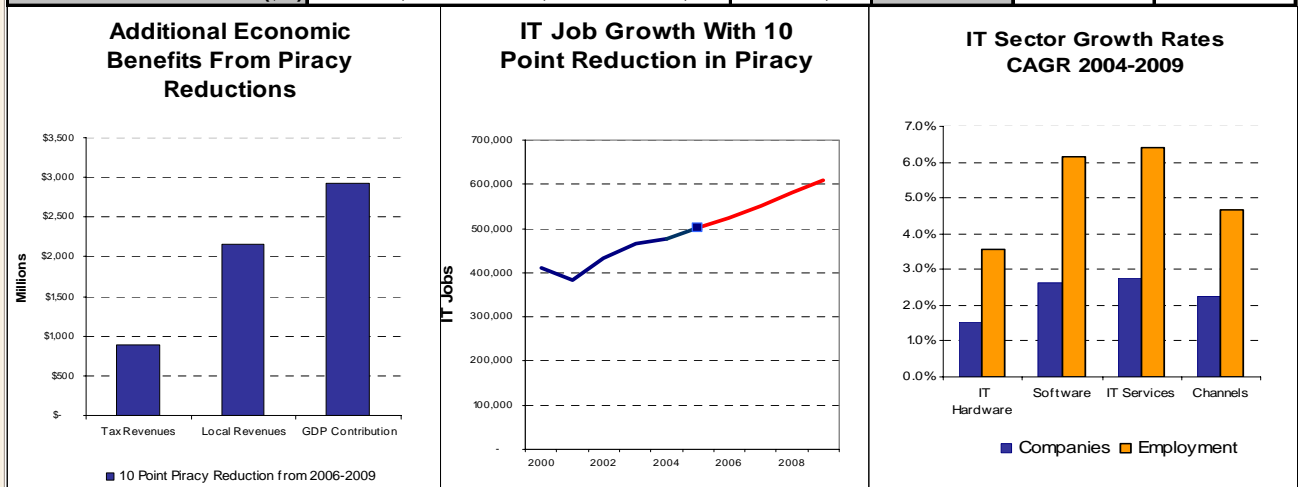
Cutting Korea's piracy rate to 36 percent could add \$2.9 billion to its economy, directly create 18,000 new IT jobs, and increase local industry sales by more than \$2.1 billion. For Korea's government, the cumulative effect of all this growth could mean an additional \$887 million in tax revenues.

An IT Sector Already Poised to Deliver on Its Promise

Between 2000 and 2004, Korea's IT sector created more than 65,000 new IT jobs. Korea's IT sector now consists of 28,000 businesses, employing more than 475,000 people and generating \$10 billion a year in taxes to pay for public services. By further reducing its software piracy rate, Korea could accelerate its future IT sector growth — growing nearly 50 percent to become an \$18.5-billion and 610,000-employee economic powerhouse by 2009.

Korea's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	KRW Millions	USD Millions	KRW Millions	USD Millions	KRW Millions	CAGR
IT Hardware	\$ 8,051	9,266,125	\$ 6,690	7,699,799	\$ 8,586	9,881,348	5.1%
Software	\$ 1,944	2,237,345	\$ 1,794	2,064,506	\$ 2,734	3,146,287	8.8%
IT Services	\$ 2,349	2,703,474	\$ 4,045	4,655,508	\$ 6,274	7,220,917	9.2%
Total IT Revenue	\$ 12,344	14,206,944	\$ 12,529	14,419,813	\$ 17,594	20,248,552	7.0%

Korea's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 15,041	\$ 16,708	\$ 24,060	\$ 25,310	\$2,925	44.0%	51.5%
Jobs	411,466	477,309	592,186	610,420	18,234	24.1%	27.9%
IT Tax Revenues (\$M)	\$ 8,751	\$ 10,039	\$ 15,085	\$ 15,467	\$887	50.3%	54.1%



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MALAYSIA

Malaysia's \$2.9 Billion IT Sector Could Nearly Double in Size, Creating New Economic Opportunities, Jobs, and Businesses

Malaysia's IT sector has already become an 184,000-employee, \$2.9-billion-a-year generator of economic opportunity. If the country reduces its 61 percent software piracy rate by 10 points, the sector could grow to \$5.5 billion a year supporting a quarter of a million employees by 2009.

Piracy Reductions: a Sound Investment for Economic Benefits

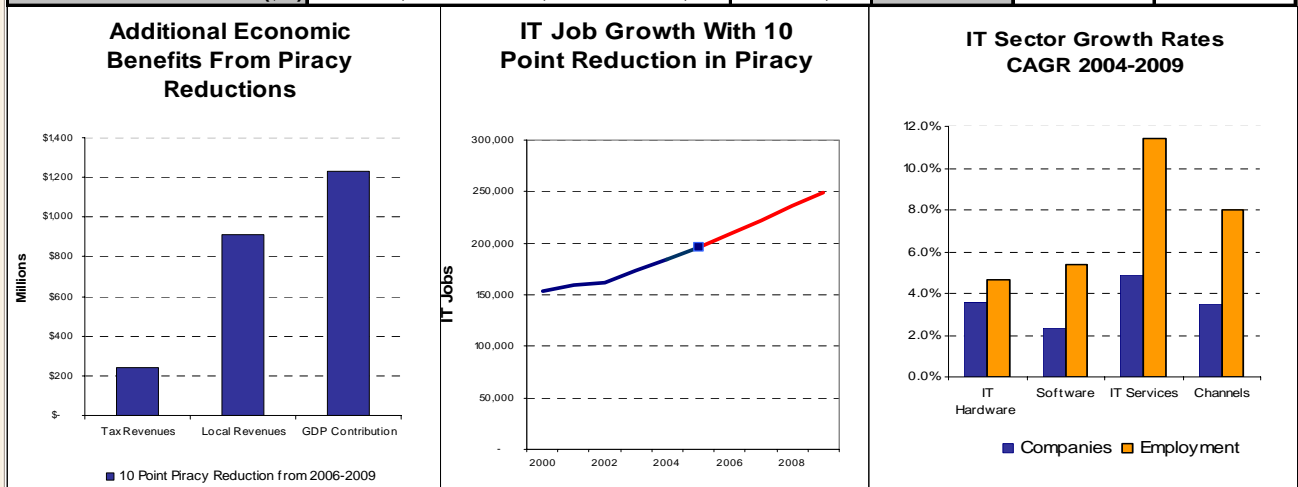
Cutting Malaysia's piracy rate from 61 percent to 51 percent could add \$1.2 billion to its economy, increase local industry revenues by more than \$900 million, and pump an additional \$241 million into Malaysia's tax coffers. The 10-point reduction could also create another 5,400 new IT jobs for Malaysia's entrepreneurial workforce.

A Strong IT Sector Is a Potent Stimulant

Software is already helping Malaysia's IT sector create new growth for the economy, new business opportunities for its entrepreneurs, new jobs for its workers, and new tax revenues for its government. Driven by software and strong IT services growth, Malaysia's IT sector now creates opportunities for 6,250 businesses and 184,000 workers, and generates nearly \$2.7 billion a year in taxes for the government. With further piracy reductions, Malaysia's IT sector has the potential to nearly double in size by 2009.

Malaysia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	MYR Millions	USD Millions	MYR Millions	USD Millions	MYR Millions	CAGR
IT Hardware	\$ 1,564	5,943	\$ 1,675	6,369	\$ 2,836	10,782	11.1%
Software	\$ 368	1,398	\$ 425	1,616	\$ 616	2,343	7.7%
IT Services	\$ 371	1,410	\$ 802	3,047	\$ 1,703	6,475	16.3%
Total IT Revenue	\$ 2,302	8,751	\$ 2,902	11,032	\$ 5,156	19,599	12.2%

Malaysia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 2,709	\$ 3,751	\$ 6,874	\$ 7,394	\$1,231	83.2%	97.1%
Jobs	153,215	184,068	243,690	249,141	5,451	32.4%	35.4%
IT Tax Revenues (\$M)	\$ 1,880	\$ 2,684	\$ 4,297	\$ 4,399	\$241	60.1%	63.9%



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NEW ZEALAND

With Low Piracy and a Fast-Growing Software Industry, New Zealand's IT Sector Has the Potential to Become a \$4-Billion Powerhouse

Benefiting from one of the lowest piracy rates in the global survey, New Zealand has translated growth in its IT sector into tangible economic benefits — adding 3,700 new jobs since 2000 as the sector grew to nearly \$3 billion a year. If New Zealand further reduced its 23-percent piracy rate by another 10 points, its IT sector could grow to \$4 billion by 2009.

Cutting Piracy Could Speed Growth

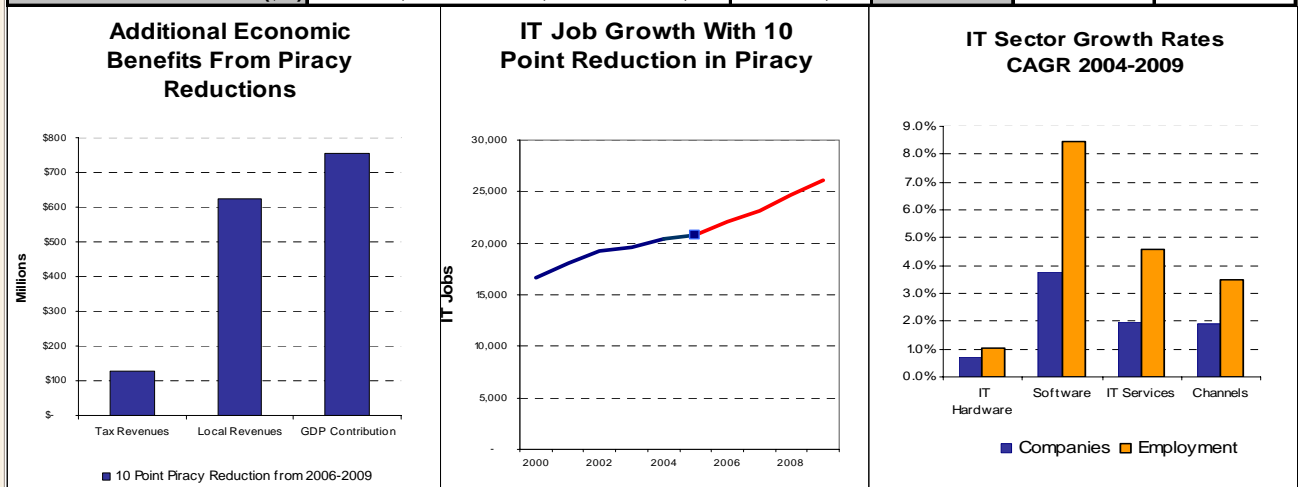
Decreasing New Zealand's piracy rate from 23 percent to 13 percent would add \$750 million to its economy, create 1,200 more new jobs, and increase local industry revenues by more than \$625 million. The aggregate effect could mean an additional \$126 million in tax revenues for New Zealand's government.

Low Piracy: A Proven Economic Engine

Between 2000 and 2004, software demand helped increase New Zealand's IT revenues by 5 percent a year on average, adding \$1.4 billion to the economy. Fueled by low piracy, now even stronger software growth is poised to drive future IT growth — helping the IT sector grow from a large 3.1 percent to an even more powerful 3.4 percent of New Zealand's GDP by 2009. As the IT sector becomes a greater part of the economy, it will create more businesses, jobs, and taxes in the process.

New Zealand's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	NZD Millions	USD Millions	NZD Millions	USD Millions	NZD Millions	CAGR
IT Hardware	\$ 1,181	1,782	\$ 1,131	1,707	\$ 1,254	1,892	2.1%
Software	\$ 379	571	\$ 396	598	\$ 599	904	8.6%
IT Services	\$ 917	1,384	\$ 1,432	2,161	\$ 1,965	2,966	6.5%
Total IT Revenue	\$ 2,476	3,737	\$ 2,959	4,466	\$ 3,818	5,762	5.2%

New Zealand's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 3,415	\$ 4,366	\$ 5,796	\$ 6,120	\$755	32.7%	40.2%
Jobs	16,649	20,376	24,916	26,151	1,235	22.3%	28.3%
IT Tax Revenues (\$M)	\$ 1,190	\$ 1,474	\$ 2,009	\$ 2,063	\$126	36.3%	39.9%



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PHILIPPINES

The Philippines' \$1 Billion IT Sector Could Nearly Double by 2009 — Creating New Jobs and Opportunities

Reducing software piracy from its current 71 percent to 61 percent could help the Philippines' emerging IT sector grow from \$1.1 billion today to \$2.1 billion by 2009.

Controlling Piracy Can Stimulate Growth

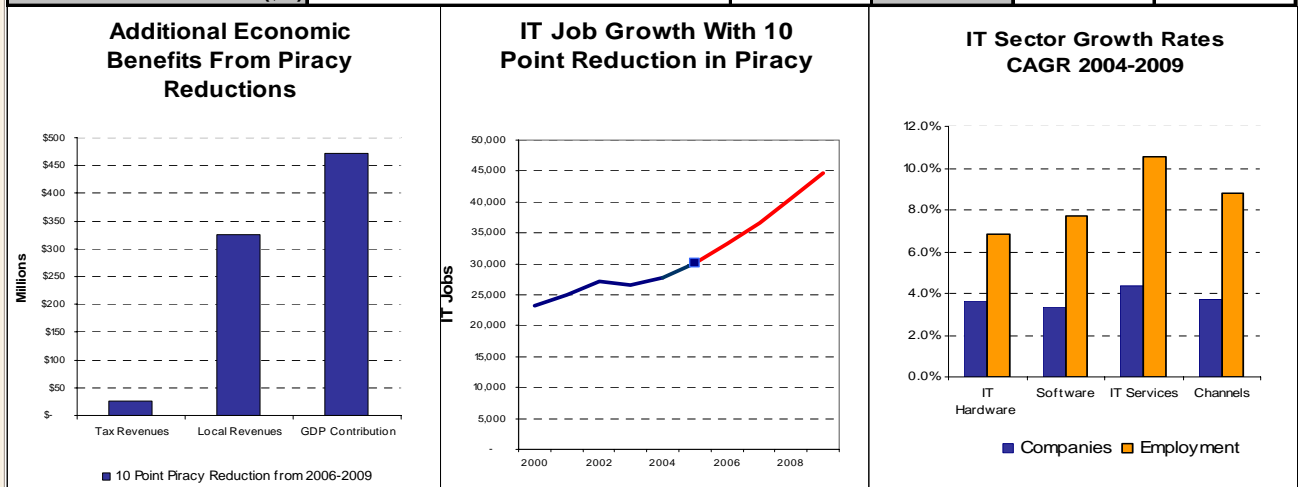
Cutting the Philippines' piracy rate to 61 percent could add \$470 million to its economy, create nearly 2,200 new IT jobs, and increase local industry sales by \$325 million. For the Philippines' government, the cumulative effect of all this growth could mean an additional \$25 million in tax revenues.

Transforming IT Growth Into Tangible Economic Gains

Stifled by high piracy rates, demand for software actually shrank 18 percent between 2000 and 2004. This low software demand helped to stall overall IT sector gains between 2000 and 2004. However, the Philippines' software and IT sectors are now primed for rapid future growth. With the help of further software piracy cuts, the Philippines' IT industry could grow by 95 percent, generate nearly 17,000 more IT jobs, and add \$1.3 billion a year to its IT-enabled economy by 2009.

Philippines's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	PHP Millions	USD Millions	PHP Millions	USD Millions	PHP Millions	CAGR
IT Hardware	\$ 546	30,697	\$ 643	36,147	\$ 1,134	63,740	12.0%
Software	\$ 172	9,678	\$ 140	7,892	\$ 233	13,103	10.7%
IT Services	\$ 243	13,642	\$ 286	16,089	\$ 565	31,750	14.6%
Total IT Revenue	\$ 961	54,017	\$ 1,070	60,128	\$ 1,933	108,593	12.5%

Philippines's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,223	\$ 1,363	\$ 2,499	\$ 2,703	\$472	83.4%	98.3%
Jobs	23,271	27,685	42,498	44,663	2,165	53.5%	61.3%
IT Tax Revenues (\$M)	\$ 67	\$ 76	\$ 136	\$ 147	\$25	78.1%	92.3%



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SINGAPORE

Singapore's Burgeoning IT Sector Could Grow by Nearly \$1 Billion — Creating New Business Opportunities, Jobs, and Economic Expansion

A thriving IT workforce has helped Singapore's IT sector grow to \$3.7 billion a year. If the country further reduced its 42-percent piracy rate by 10 points, its IT industry could grow to more than \$4.6 billion by 2009.

Potential for Even Greater Economic Benefits

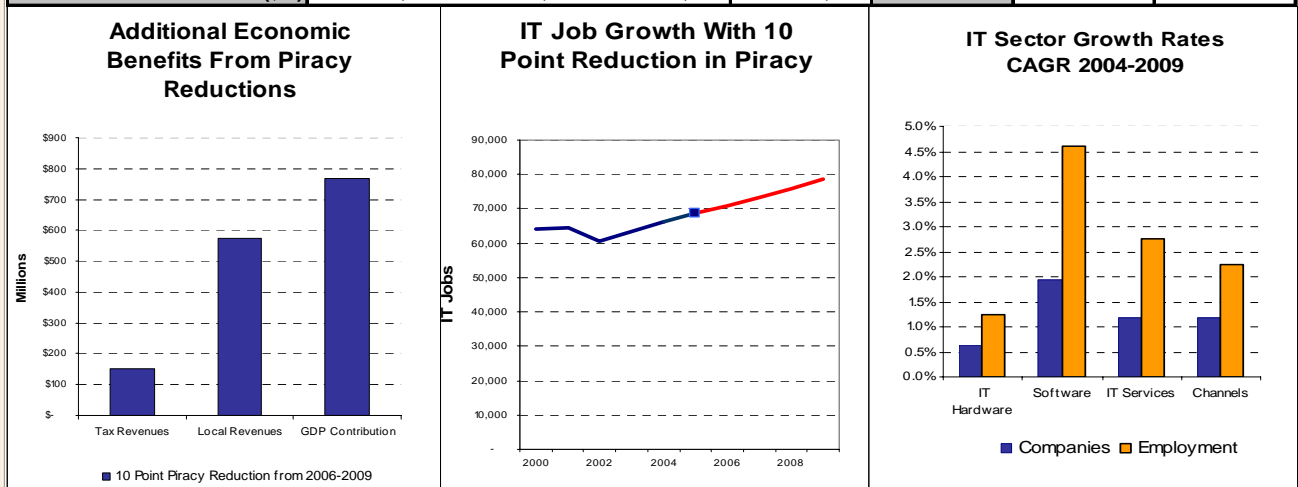
Decreasing Singapore's piracy rate to 32 percent would add \$770 million to its economy, create 3,700 more new jobs, and increase local industry revenues by another \$573 million. This new vibrancy would, in turn, generate an additional \$150 million in tax revenue to help Singapore's government pay for vital public services.

Piracy Cuts Could Help Largest IT Sector Grow Even Larger

With the help of large software demand, Singapore now enjoys the benefits from the largest IT sector as a percentage of its economy in the global survey — making up 3.5 percent of the country's GDP. In coming years, the software sector will lead the IT sector in growth with an impressive 6.6 percent per year average growth rate — growing 3.7 times faster than the hardware sector between 2004 and 2009. Decreasing Singapore's piracy rate would help increase the size of Singapore's IT sector by nearly \$1 billion.

Singapore's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	SGD Millions	USD Millions	SGD Millions	USD Millions	SGD Millions	CAGR
IT Hardware	\$ 1,931	3,264	\$ 1,673	2,828	\$ 1,826	3,087	1.8%
Software	\$ 724	1,224	\$ 586	991	\$ 806	1,363	6.6%
IT Services	\$ 1,058	1,790	\$ 1,471	2,488	\$ 1,787	3,021	4.0%
Total IT Revenue	\$ 3,713	6,278	\$ 3,730	6,307	\$ 4,419	7,471	3.4%

Singapore's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 5,068	\$ 5,417	\$ 6,489	\$ 6,809	\$770	19.8%	25.7%
Jobs	64,199	66,200	75,095	78,795	3,700	13.4%	19.0%
IT Tax Revenues (\$M)	\$ 1,121	\$ 1,279	\$ 1,816	\$ 1,880	\$150	42.0%	47.1%



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TAIWAN

Taiwan's IT Sector Could Generate 20,000 New IT Jobs and Add \$1.5 Billion a Year to an Already Thriving IT Enabled Economy

Taiwan has grown its IT sector to nearly \$6.2 billion a year. A further 10-point reduction in its 43 percent piracy rate could help Taiwan's IT sector become a \$7.3-billion-a-year engine for jobs, taxes, and economic opportunity.

Reducing Piracy Could Pump Millions More Into the Economy

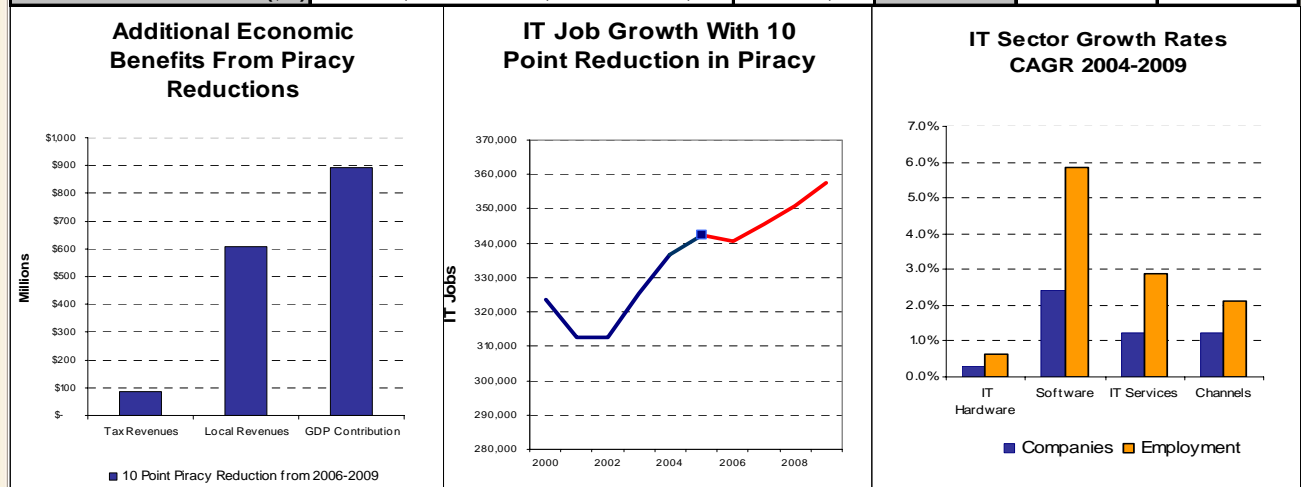
A 10-point drop in Taiwan's piracy rate could directly create 3,000 new IT jobs and pump nearly \$900 million into the economy. It could also increase local industry revenues by more than \$600 million and generate \$88 million in additional tax revenues.

The Proven Power of Piracy Cuts

Between 2000 and 2004, software growth fueled an increase in the number of Taiwanese software companies by 5 percent a year and helped increase software jobs by 8 percent per year on average. Similarly the IT sector added \$215 million a year by 2004 to the economy, and created 13,000 new IT jobs. In coming years, the software sector will lead the IT sector in growth with an impressive 8.4-percent-per-year average growth rate. Further piracy cuts have the potential to accelerate IT benefits, adding \$1.2 billion a year to its IT-enabled economy by 2009.

Taiwan's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	TWD Millions	USD Millions	TWD Millions	USD Millions	TWD Millions	CAGR
IT Hardware	\$ 4,065	136,063	\$ 4,283	143,354	\$ 4,483	150,054	0.9%
Software	\$ 707	23,662	\$ 744	24,902	\$ 1,112	37,216	8.4%
IT Services	\$ 1,187	39,741	\$ 1,148	38,422	\$ 1,406	47,044	4.1%
Total IT Revenue	\$ 5,960	199,466	\$ 6,175	206,678	\$ 7,001	234,315	2.5%

Taiwan's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 7,241	\$ 7,432	\$ 8,600	\$ 8,975	\$894	15.7%	20.8%
Jobs	323,640	336,673	354,575	357,595	3,020	5.3%	6.2%
IT Tax Revenues (\$M)	\$ 2,565	\$ 2,917	\$ 3,785	\$ 3,823	\$88	29.7%	31.0%



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THAILAND

Thailand's Emerging IT Sector Could Nearly Double in Size, Creating New Economic Opportunity, Jobs, and Businesses

Thailand's IT sector has grown into a thriving \$2.3 billion industry. Reducing Thailand's 79-percent piracy rate by another 10 percentage points would help the industry grow to \$4.5 billion by 2009.

Less Piracy Would Mean More IT Sector Benefits

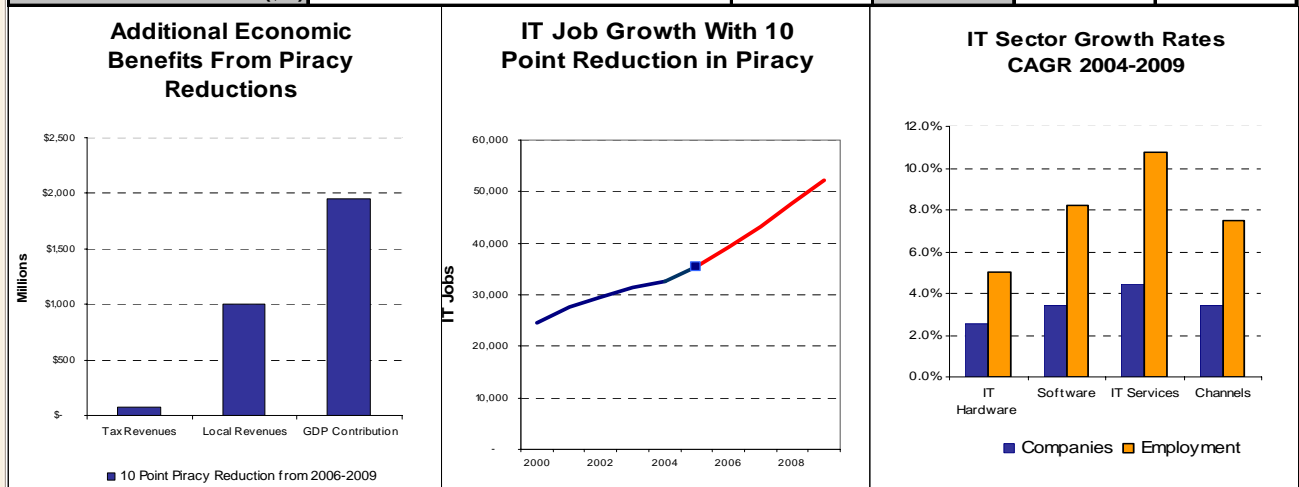
Thailand could add \$1.9 billion to its economy, create 4,700 high-wage technology jobs, increase local industry revenues by \$1 billion, and generate an additional \$74 million in tax revenues by decreasing the country's piracy rate from 79 percent to 69 percent.

Fighting Piracy Is a Proven Strategy

Between 2000 and 2004, demand for software in Thailand grew 15 percent, helping the IT sector add millions to the economy and create 8,000 new IT jobs. By further reducing its software piracy rate, Thailand could accelerate its future IT sector growth — growing 90 percent larger instead of 64 percent between 2004 and 2009.

Thailand's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	THB Millions	USD Millions	THB Millions	USD Millions	THB Millions	CAGR
IT Hardware	\$ 1,050	42,315	\$ 1,570	63,273	\$ 2,370	95,517	8.6%
Software	\$ 222	8,966	\$ 256	10,332	\$ 440	17,754	11.4%
IT Services	\$ 276	11,111	\$ 522	21,042	\$ 1,048	42,233	15.0%
Total IT Revenue	\$ 1,548	62,392	\$ 2,348	94,647	\$ 3,858	155,504	10.4%

Thailand's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,535	\$ 2,413	\$ 4,136	\$ 4,955	\$1,945	71.4%	105.4%
Jobs	24,591	32,686	47,385	52,148	4,763	45.0%	59.5%
IT Tax Revenues (\$M)	\$ 90	\$ 136	\$ 235	\$ 266	\$74	72.8%	95.9%



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VIETNAM

Vietnam's Emerging IT Sector Could More Than Double in Size, Creating 12,000 New Jobs

If Vietnam can cut its 92-percent piracy rate, the highest in the world, its budding IT sector stands to more than double in size — growing from \$500 million today to nearly \$1.4 billion by 2009. A 10-point reduction would help Vietnam unleash the creative potential of its entrepreneurs, who in turn could employ 12,000 more of Vietnam's workers in high-wage jobs.

More to Gain Than Most From Piracy Reductions

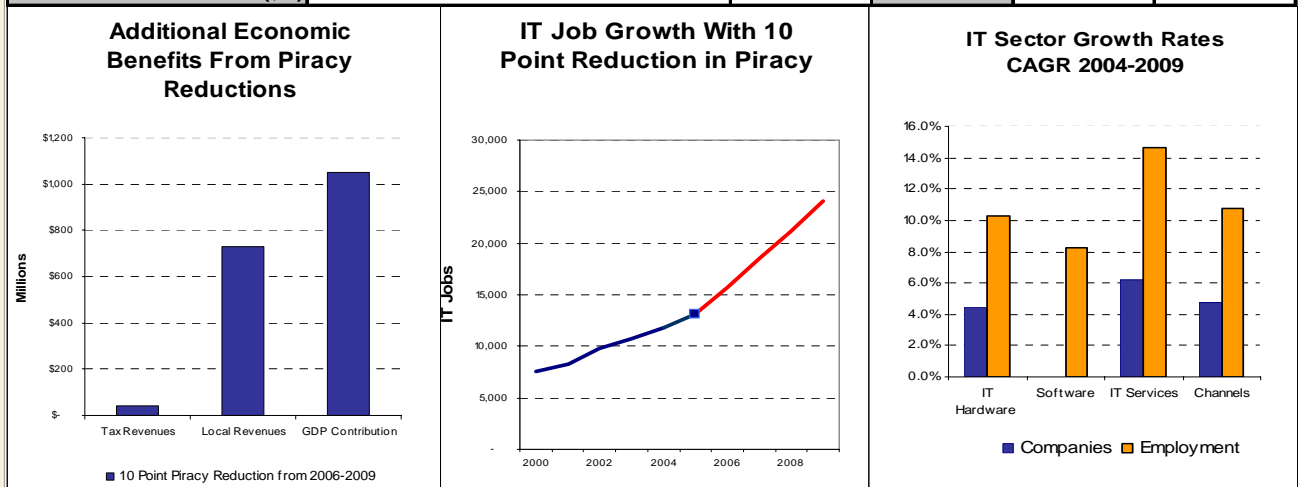
Projected to see some of the Asia-Pacific region's largest benefits, Vietnam would add \$1 billion to its economy, create 4,000 more new jobs, and increase local industry revenues by more than \$727 million by decreasing its piracy rate to 82 percent. That, in turn, would generate an additional \$43 million in tax revenue for Vietnam's government.

Vietnam Could Achieve Among the World's Fastest IT Growth

Vietnam's high 92-percent software piracy rate has impeded the growth of its software and IT industries, restricting the IT sector to one of the smallest in the region. As a result, Vietnam has more to gain than most other countries from tackling its piracy problem. Since 2000, Vietnam has seen a 34 percent increase in software sales. Vietnam could achieve much stronger growth with a concerted effort to cut piracy. With a 10-point reduction in piracy, Vietnam's IT sector could grow 170 percent, instead of the estimated 108 percent, and achieve the third-greatest potential IT growth in the global survey.

Vietnam's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	VND Millions	USD Millions	VND Millions	USD Millions	VND Millions	CAGR
IT Hardware	\$ 236	3,810,846	\$ 396	6,407,788	\$ 787	12,733,446	14.7%
Software	\$ 18	296,449	\$ 25	398,696	\$ 43	695,544	11.8%
IT Services	\$ 42	683,579	\$ 88	1,421,186	\$ 227	3,664,743	20.9%
Total IT Revenue	\$ 296	4,790,874	\$ 509	8,227,670	\$ 1,057	17,093,733	15.7%

Vietnam's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 340	\$ 595	\$ 1,274	\$ 1,693	\$1,052	114.0%	184.4%
Jobs	7,593	11,779	19,939	24,036	4,097	69.3%	104.1%
IT Tax Revenues (\$M)	\$ 13	\$ 23	\$ 48	\$ 65	\$43	109.1%	184.3%



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ARGENTINA

Argentina's Emerging IT Sector Could More Than Double in Size — Creating Billions in New Economic Opportunities, Jobs, and Tax

High software piracy rates have hampered Argentina's ability to grow its IT sector and create new jobs. If the country can cut its 75-percent piracy rate by 10 points, Argentina's IT sector stands to grow from \$1.9 billion today to \$4.6 billion by 2009 and help Argentina unlock the creative potential of its workers.

Benefits From Reducing Piracy Could Be Substantial

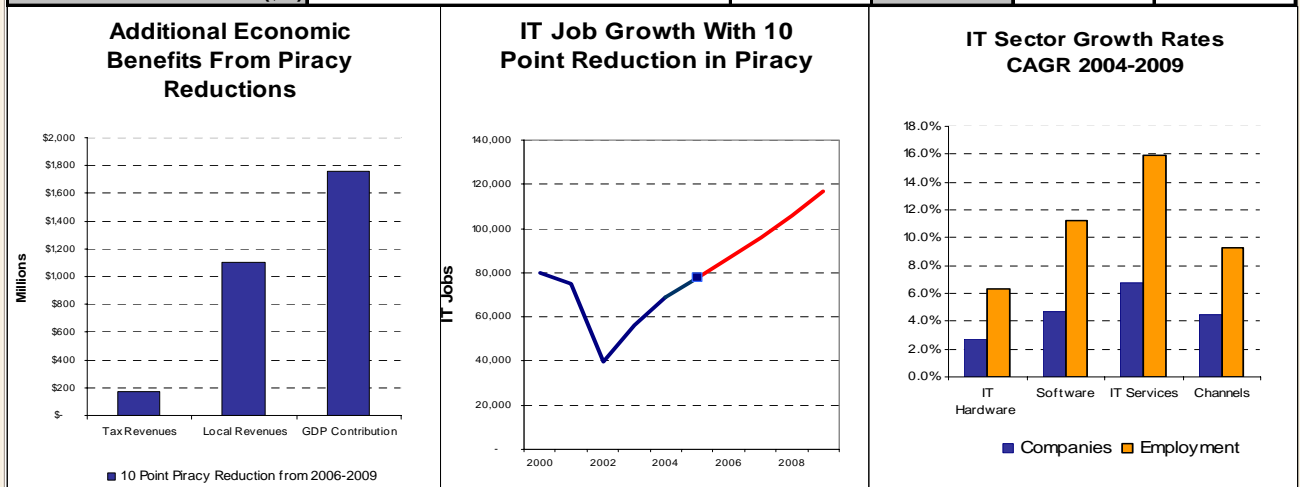
A 10-point drop in Argentina's piracy rate could create 7,000 new jobs and pump \$1.8 billion into the economy. It could also increase local industry revenues by more than \$1.1 billion and generate an additional \$173 million in tax revenues for Argentina's government.

An IT Sector Poised for Enormous Opportunity

Between 2000 and 2004, Argentina saw demand for software fall by 18 percent, its IT sector shrink, and the loss of 11,000 high tech jobs. But Argentina could now see some of the largest economic gains — growing faster than any other Latin American IT sector and faster than all but three countries in the global survey — by reducing its piracy rate to 65 percent. With the help of a 10-point cut in piracy, Argentina could add another 48,000 high tech jobs to its economy by 2009.

Argentina's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	ARS Millions	USD Millions	ARS Millions	USD Millions	ARS Millions	CAGR
IT Hardware	\$ 2,862	8,462	\$ 891	2,635	\$ 1,364	4,033	8.9%
Software	\$ 404	1,196	\$ 330	976	\$ 685	2,024	15.7%
IT Services	\$ 1,130	3,340	\$ 715	2,113	\$ 1,937	5,728	22.1%
Total IT Revenue	\$ 4,396	12,998	\$ 1,936	5,723	\$ 3,986	11,785	15.5%

Argentina's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 5,454	\$ 2,612	\$ 5,798	\$ 6,583	\$1,760	122.0%	152.0%
Jobs	80,192	68,913	110,024	117,060	7,036	59.7%	69.9%
IT Tax Revenues (\$M)	\$ 748	\$ 448	\$ 858	\$ 935	\$173	91.4%	108.5%



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BRAZIL

Brazil's Burgeoning IT Sector Characterized by Growth and Opportunity

Growing demand for software has helped Brazil's IT sector become a nearly \$11-billion-a-year engine for jobs, and tax benefits. If the country reduced its 64-percent piracy rate by 10 points, its IT industry could transform into a \$17 billion a year industry in just four years.

Reducing Piracy Could Boost the Economy

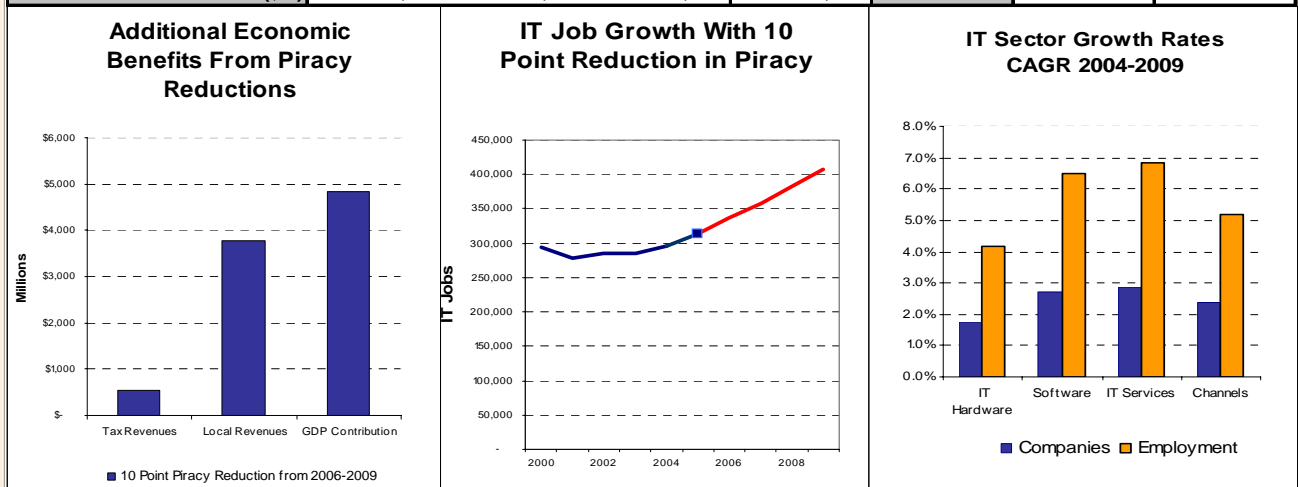
Brazil could add \$4.8 billion to its economy, directly create 21,000 high-wage technology jobs, increase local industry revenues by \$3.7 billion, and generate an additional \$550 million in tax revenues — all by decreasing the country's piracy rate from 64 percent to 54 percent.

Software Is an Engine for Economic Growth

Strong software demand helped drive IT sector benefits — creating more than 1,000 new IT jobs between 2000 and 2004. Brazil now has the largest IT sector in Latin America as a percentage of its economy. Brazil also stands to gain the most from a 10-point piracy cut, helping Brazil's IT sector generate 112,000 more jobs, create \$1.7 billion a year in additional tax revenues, and add \$9.7 billion a year to an already growing IT economy by 2009.

Brazil's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	BRL Millions	USD Millions	BRL Millions	USD Millions	BRL Millions	CAGR
IT Hardware	\$ 7,841	22,945	\$ 5,130	15,012	\$ 6,801	19,901	5.8%
Software	\$ 1,578	4,618	\$ 1,756	5,137	\$ 2,708	7,925	9.1%
IT Services	\$ 4,133	12,094	\$ 3,909	11,439	\$ 6,161	18,029	9.5%
Total IT Revenue	\$ 13,552	39,656	\$ 10,795	31,588	\$ 15,670	45,855	7.7%

Brazil's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 19,100	\$ 15,919	\$ 23,595	\$ 25,637	\$4,840	48.2%	61.0%
Jobs	294,931	295,966	386,617	408,215	21,598	30.6%	37.9%
IT Tax Revenues (\$M)	\$ 3,655	\$ 3,499	\$ 4,950	\$ 5,181	\$550	41.4%	48.1%



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CHILE

With Piracy Cuts, Chile's IT Sector Could Create 1,600 New Jobs, \$55 Million in Taxes, and Grow to \$1.8 Billion

Strong demand for software has helped Chile's IT sector become a \$1.2 billion industry. If Chile reduced its 64 percent software piracy rate by 10 points, the industry could grow to over \$1.8 billion by 2009, creating new opportunities for entrepreneurs and new jobs for Chile's workforce.

Reducing Piracy Is a Sound Investment

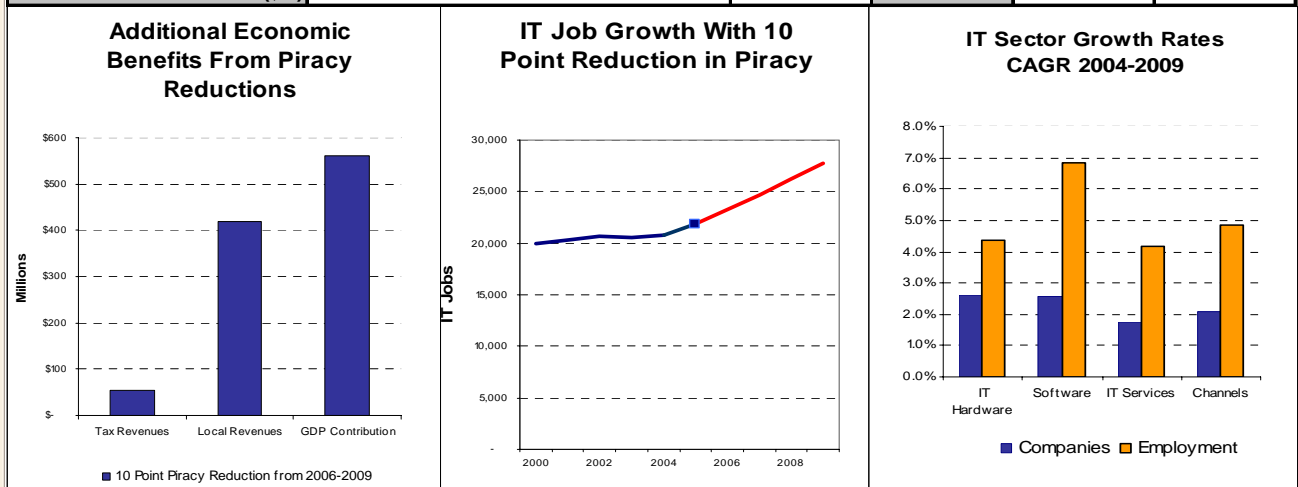
Cutting Chile's piracy rate from 64 percent to 54 percent could add a half a billion dollars to its economy, increase local industry revenues by more than \$418 million, generate an additional \$55 million in tax revenues, and create 1,600 new jobs.

Software Will Lead Future IT Growth

Between 2000 and 2004, demand for software grew 40 percent — leading IT sector growth. This strong software demand has helped the IT sector add \$127 million from software alone to the economy and create nearly 820 additional IT jobs between 2000 and 2004. By reducing its software piracy rate, Chile's IT enabled economy could become a \$2.5-billion and 28,000-employee economic powerhouse by 2009.

Chile's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	CLP Millions	USD Millions	CLP Millions	USD Millions	CLP Millions	CAGR
IT Hardware	\$ 756	470,256	\$ 567	352,409	\$ 763	474,429	6.1%
Software	\$ 152	94,342	\$ 213	132,192	\$ 334	207,804	9.5%
IT Services	\$ 342	212,859	\$ 412	255,822	\$ 545	338,918	5.8%
Total IT Revenue	\$ 1,251	777,458	\$ 1,191	740,423	\$ 1,643	1,021,151	6.6%

Chile's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,604	\$ 1,625	\$ 2,234	\$ 2,469	\$562	37.4%	51.9%
Jobs	19,934	20,756	26,166	27,802	1,636	26.1%	33.9%
IT Tax Revenues (\$M)	\$ 252	\$ 286	\$ 402	\$ 425	\$55	40.6%	48.7%



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COLOMBIA

Colombia's Thriving IT Sector Can Create Even More Business Opportunities and Jobs

Strong demand for software, a proven engine for economic growth, has helped Colombia's IT sector grow to \$1.6 billion. If Colombia reduced its 55-percent software piracy rate by 10 points, the industry could grow to \$2.6 billion by 2009, creating new business opportunities for entrepreneurs and new jobs for Colombia's workforce.

Reducing Piracy Could Create Jobs and Boost the Economy

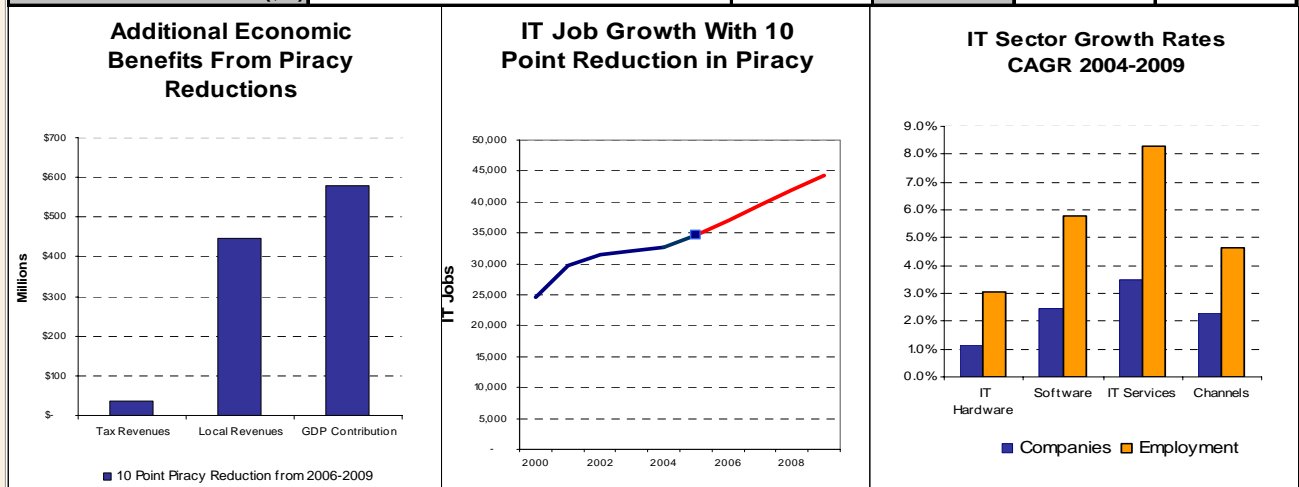
Cutting Colombia's piracy rate to 45 percent could pump \$581 million into its economy, create 1,900 new jobs, and increase local industry sales by almost \$450 million. For Colombia's government, the cumulative effect of all this growth could mean an additional \$38 million in tax revenues.

The Proven Power of Fast Growth in the Software Industry

With lowest piracy rate in Latin America, strong software demand spurred the fastest-growing software sector in the region — growing 48 percent between 2000 and 2004. Software growth has helped Colombia's IT sector become the second largest as a percentage of GDP in Latin America, consisting of nearly 3,000 businesses, employing more than 32,000 people, and generating almost \$158 million a year in taxes.

Colombia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	COP Millions	USD Millions	COP Millions	USD Millions	COP Millions	CAGR
IT Hardware	\$ 922	2,467,537	\$ 708	1,894,301	\$ 874	2,337,797	4.3%
Software	\$ 172	459,669	\$ 253	678,452	\$ 373	997,705	8.0%
IT Services	\$ 419	1,120,984	\$ 650	1,738,945	\$ 1,123	3,006,495	11.6%
Total IT Revenue	\$ 1,513	4,048,189	\$ 1,611	4,311,698	\$ 2,370	6,341,997	8.0%

Colombia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,941	\$ 2,272	\$ 3,493	\$ 3,739	\$581	53.7%	64.6%
Jobs	24,604	32,625	42,442	44,358	1,916	30.1%	36.0%
IT Tax Revenues (\$M)	\$ 136	\$ 158	\$ 233	\$ 249	\$38	46.9%	56.9%



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COSTA RICA

Lower Piracy and Continued Software Growth Could Help Boost Costa Rica's IT Sector by 72 Percent

Strong growth in the software industry has helped Costa Rica's IT sector grow to \$215 million a year. Reducing its 67 percent piracy rate to 57 percent by 2009 could help the industry become a \$371-million-a-year and nearly 5,000-employee engine for economic opportunity.

Reducing Piracy Could Open Doors Into the Information Age

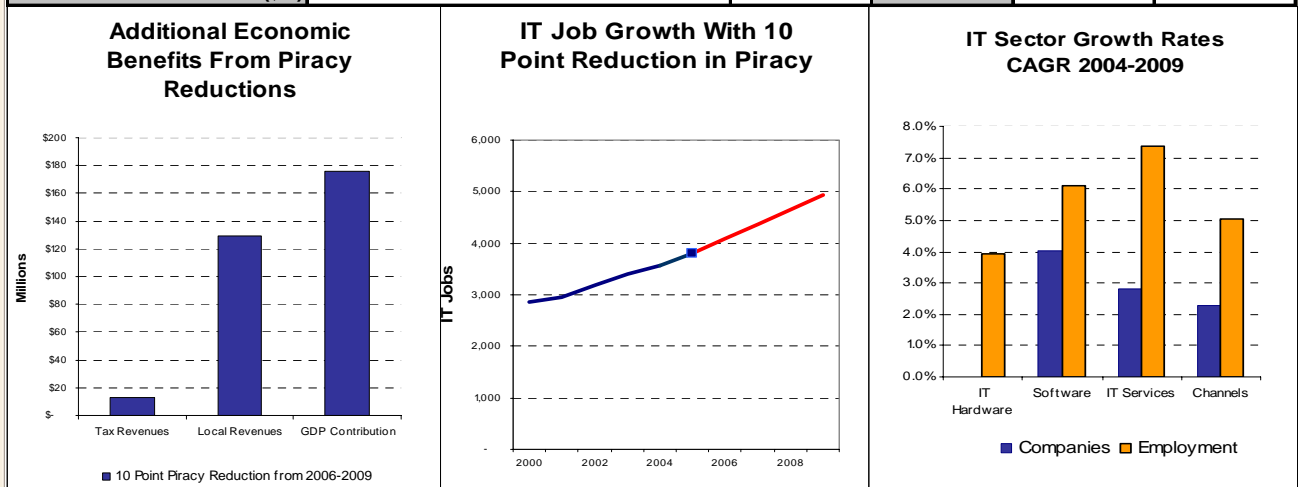
Projected to see the largest relative benefit in Latin America, Costa Rica could add \$176 million to its economy, create hundreds more high-wage technology jobs, increase local industry revenues by \$130 million, and generate an additional \$13 million in tax revenues — all by decreasing the country's piracy rate from 67 percent to 57 percent.

Fighting Piracy Is a Proven Strategy

Costa Rica saw the fastest IT sector growth between 2000 and 2004 and now benefits from the largest software sector as a percentage of its IT sector. By further reducing its software piracy rate, Costa Rica could further accelerate its future IT sector growth and benefits — growing 72 percent instead of 45 percent between 2004 and 2009.

Costa Rica's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	CRC Millions	USD Millions	CRC Millions	USD Millions	CRC Millions	CAGR
IT Hardware	\$ 71	31,943	\$ 99	44,392	\$ 129	57,821	5.4%
Software	\$ 33	14,697	\$ 48	21,487	\$ 72	32,367	8.5%
IT Services	\$ 43	19,292	\$ 68	30,551	\$ 111	49,770	10.3%
Total IT Revenue	\$ 147	65,933	\$ 215	96,430	\$ 313	139,958	7.7%

Costa Rica's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 196	\$ 291	\$ 435	\$ 507	\$176	49.2%	74.1%
Jobs	2,848	3,556	4,573	4,932	359	28.6%	38.7%
IT Tax Revenues (\$M)	\$ 34	\$ 45	\$ 66	\$ 71	\$13	46.6%	58.4%



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DOMINICAN REPUBLIC

The Dominican Republic's Emerging IT Sector Could Grow Nearly 50% — Creating New Economic Opportunities, Jobs, and Tax Revenues

Growing software demand has already helped the Dominican Republic's IT sector grow into a budding \$154-million industry. Reducing the Dominican Republic's 77-percent piracy rate by 10 percentage points would help the industry grow to more than \$223 million by 2009 and unlock a new era of IT-driven economic opportunity.

Fighting Piracy Could Generate Millions in Taxes for Public Services

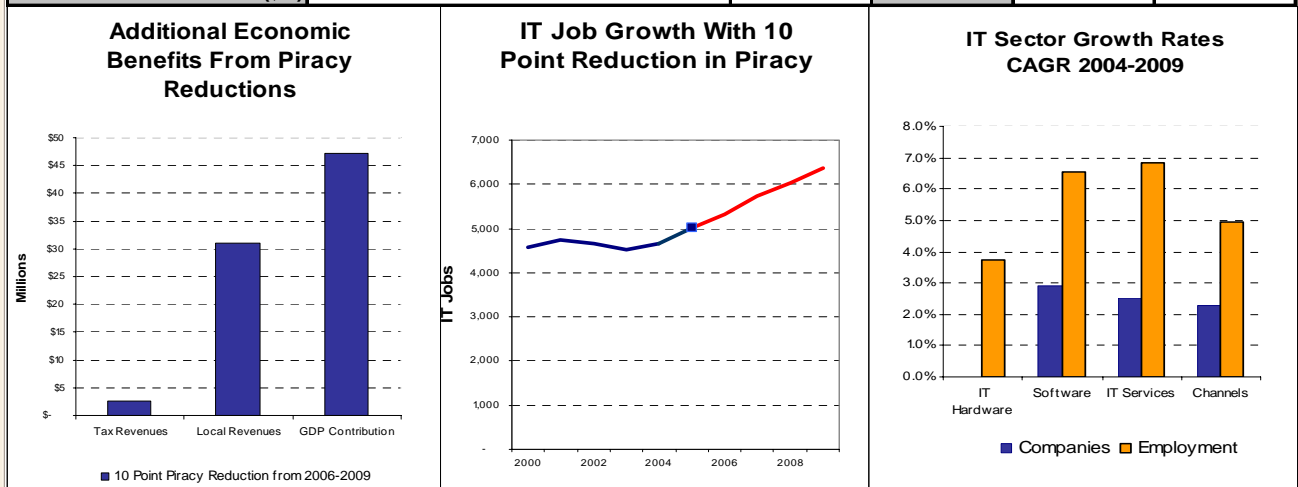
Cutting the Dominican Republic's piracy rate from 77 percent to 67 percent could add \$47 million to its economy, increase local industry revenues by more than \$31 million, and pump an additional \$3 million into the Dominican Republic's tax coffers. The 10-point reduction could also create hundreds of new IT jobs.

Software and Services Will Lead Future IT Growth

Between 2000 and 2004, demand for software in the Dominican Republic grew 6 percent. Although the Dominican Republic's IT sector is still the smallest in the Latin America region, there is enormous room for growth and tremendous opportunity for new benefits. By further reducing its software piracy rate, the Dominican Republic could accelerate future IT sector growth and benefits growing 45 percent instead of the projected 35 percent between 2004 and 2009.

Dominican Republic's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	DOP Millions	USD Millions	DOP Millions	USD Millions	DOP Millions	CAGR
IT Hardware	\$ 110	4,483	\$ 118	4,791	\$ 152	6,178	5.2%
Software	\$ 14	586	\$ 15	621	\$ 24	961	9.1%
IT Services	\$ 20	811	\$ 21	855	\$ 33	1,352	9.6%
Total IT Revenue	\$ 144	5,880	\$ 154	6,268	\$ 208	8,491	6.3%

Dominican Republic's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 167	\$ 177	\$ 245	\$ 265	\$47	38.4%	49.3%
Jobs	4,580	4,666	5,950	6,357	407	27.5%	36.2%
IT Tax Revenues (\$M)	\$ 11	\$ 11	\$ 16	\$ 17	\$3	36.5%	46.0%



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MEXICO

Mexico's Flourishing IT Sector Could Grow to \$11 Billion, Adding Tens of Thousands of Jobs and \$300 Million in Tax Revenues

A below-average piracy rate has helped Mexico's IT sector grow into a \$7-billion industry. Reducing Mexico's 65-percent piracy rate by 10 percentage points would help the industry grow by almost 50 percent to \$11 billion by 2009.

Less Piracy Could Mean Faster Growth

Decreasing Mexico's piracy rate to 55 percent would help deliver the second-largest regional benefit by pumping \$2.7 billion into its economy, creating nearly 7,000 more new jobs, and increasing local industry revenues by more than \$2 billion. The extra business activity, in turn, would generate an additional \$300 million in tax revenue to help the Mexican government pay for public benefits and services.

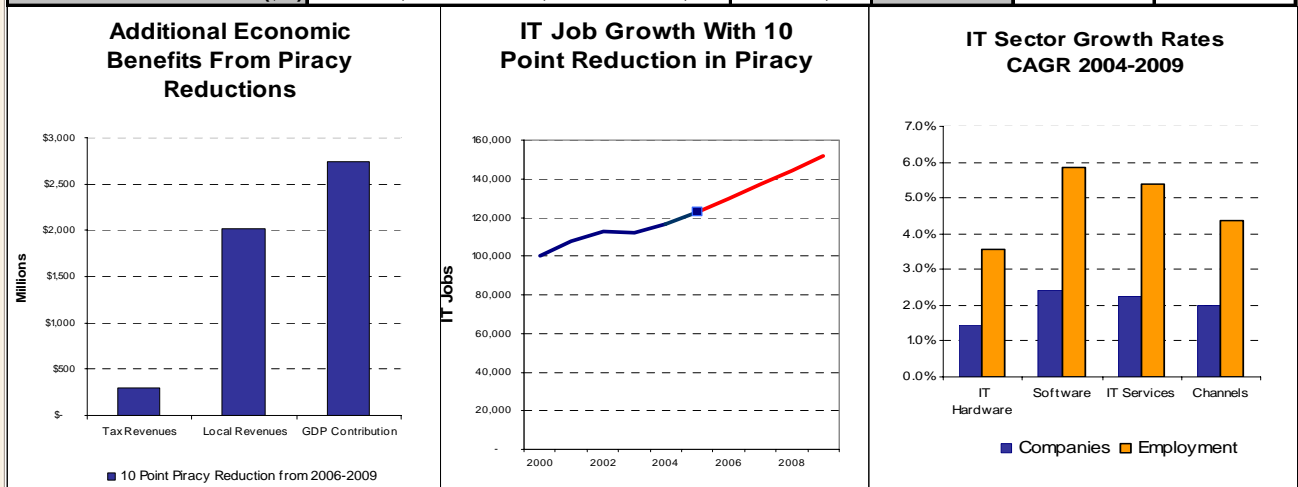
Software Will Drive Future IT Growth

A below-average piracy rate helped Mexico increase demand for software by 19 percent, and achieve the third-fastest Latin American IT sector growth between 2000 and 2004. Now, software is poised to lead future IT sector growth.

By combining further software piracy cuts with an already growing IT sector, Mexico could generate 35,000 more jobs, create \$1.1 billion in extra tax revenues, and grow 47 percent instead of 35 percent between 2004 and 2009.

Mexico's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	MXN Millions	USD Millions	MXN Millions	USD Millions	MXN Millions	CAGR
IT Hardware	\$ 4,181	47,280	\$ 4,066	45,981	\$ 5,183	58,611	5.0%
Software	\$ 910	10,296	\$ 1,083	12,251	\$ 1,599	18,089	8.1%
IT Services	\$ 1,712	19,361	\$ 2,190	24,771	\$ 3,141	35,518	7.5%
Total IT Revenue	\$ 6,803	76,937	\$ 7,339	83,003	\$ 9,923	112,218	6.2%

Mexico's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 8,617	\$ 9,636	\$ 13,229	\$ 14,368	\$2,735	37.3%	49.1%
Jobs	100,292	116,234	144,821	151,817	6,996	24.6%	30.6%
IT Tax Revenues (\$M)	\$ 1,866	\$ 2,209	\$ 3,026	\$ 3,151	\$300	37.0%	42.6%



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PANAMA

Driven by Software Growth, Panama's Emerging IT Sector Could Create New Jobs, Taxes, and Economic Opportunity

Reducing software piracy from its current 70 percent to 60 percent could help Panama's IT sector grow from \$181 million today to \$210 million by 2009 — creating new businesses, jobs, and economic opportunities.

Piracy Cuts Could Add Jobs and Revenues

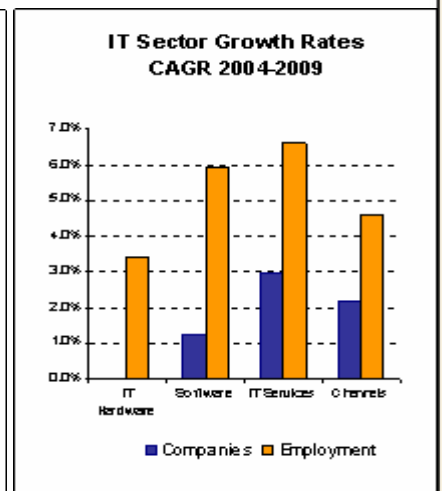
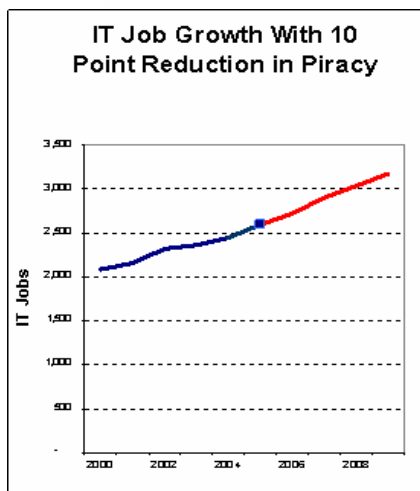
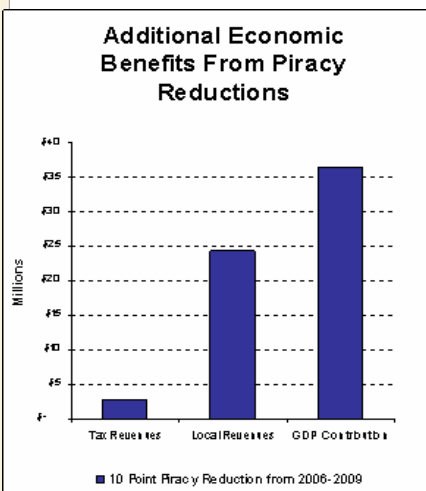
A 10-point drop in Panama's piracy rate could create new jobs and pump \$31 million into the economy. It could also increase local industry revenues by more than \$21 million and generate \$2 million in additional tax revenues.

Software Will Lead Panama's Future IT Growth

Although Panama's software sector is still emerging, software will lead its future IT sector growth, growing at the second-fastest rate in the Latin American region. With the help of a 10-point piracy cut and strong software growth, Panama's IT sector could generate 500 more jobs, create \$18 million in extra tax revenues, and add \$50 million in 2009 alone to an already growing IT economy.

Panama's IT Sector							Growth
	2000		2004		2009		2004-2009
Revenue **	USD Millions	PAB Millions	USD Millions	PAB Millions	USD Millions	PAB Millions	CAGR
IT Hardware	\$ 149	150	\$ 146	146	\$ 184	185	4.8%
Software	\$ 10	10	\$ 14	15	\$ 22	22	8.3%
IT Services	\$ 22	22	\$ 24	24	\$ 37	38	9.2%
Total IT Revenue	\$ 181	182	\$ 184	185	\$ 243	244	5.7%

Panama's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
Contribution to GDP (\$M)	\$ 204	\$ 210	\$ 283	\$ 298	\$36	34.7%	41.8%
Jobs	2,079	2,436	3,064	3,176	112	2.5.8%	30.4%
IT Tax Revenues (\$M)	\$ 26	\$ 33	\$ 52	\$ 53	\$3	56.0%	59.5%



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PERU

Peru's Half a Billion Dollar IT Sector Could Create Another 3,000 High Tech Jobs

Having created more than 600 high tech jobs in the last four years, Peru's IT sector could add another 3,000 jobs and grow from \$565 million to \$785 million by 2009 with the economic stimulus resulting from a 10-point drop in its 73 percent software piracy rate.

The Promise of Even More Jobs and Tax Revenues

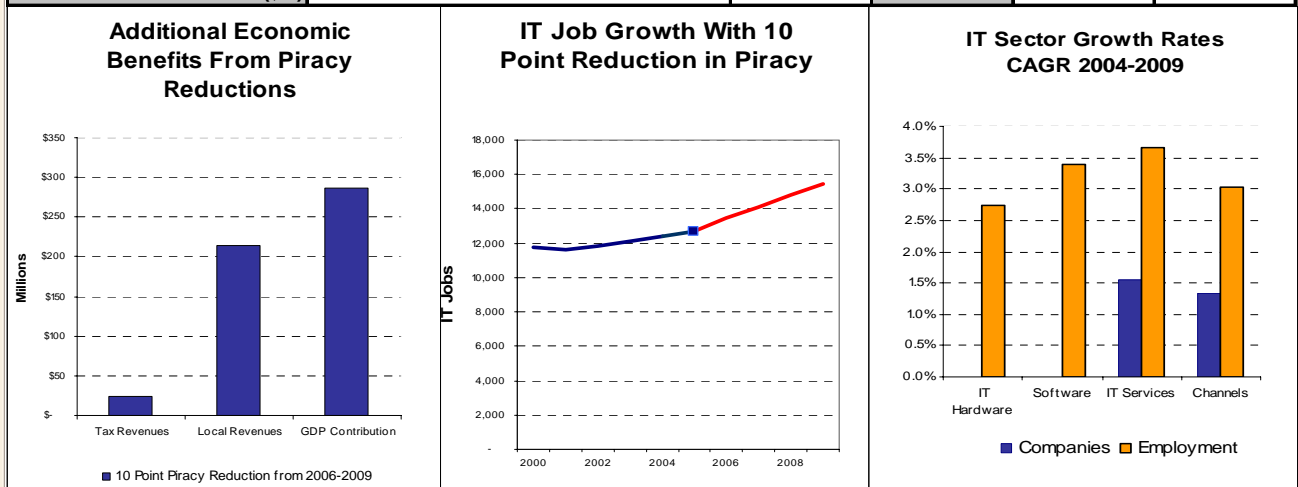
Decreasing Peru's piracy rate from 73 percent to 63 percent would add \$286 million to its economy, directly create nearly 1,000 more new jobs, and increase local industry revenues by \$214 million. The aggregate effect could mean an additional \$24 million in tax revenues for Peru's government.

Software and Services to Fuel Future IT Growth

Over the last 4 years, as software grew 12 percent and led IT sector growth, Peru gained handsomely. This software growth helped drive IT sector benefits — adding \$9 million in new revenues from software alone to the economy, and creating an estimated 676 new IT jobs between 2000 and 2004. With software and services projected to lead future IT growth, additional piracy cuts could pump jobs, opportunity, and growth into the economy.

Peru's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	PEN Millions	USD Millions	PEN Millions	USD Millions	PEN Millions	CAGR
IT Hardware	\$ 297	1,042	\$ 307	1,076	\$ 369	1,296	3.8%
Software	\$ 61	215	\$ 69	242	\$ 86	302	4.6%
IT Services	\$ 172	604	\$ 190	665	\$ 243	854	5.1%
Total IT Revenue	\$ 531	1,861	\$ 565	1,983	\$ 699	2,452	4.3%

Peru's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 704	\$ 757	\$ 944	\$ 1,056	\$286	24.7%
Jobs	11,736	12,412	14,488	15,475	987	16.7%	24.7%
IT Tax Revenues (\$M)	\$ 71	\$ 79	\$ 100	\$ 110	\$24	27.3%	39.4%



* GDP contribution excludes impact from imports and exports and includes total value of channel revenues (not just mark-up).

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PUERTO RICO

Puerto Rico's Emerging IT Sector Could Grow Nearly 50% — Creating New Economic Opportunities, Jobs, and Tax Revenues

New demand for software has helped Puerto Rico's IT sector catapult into the information age becoming a \$575-million engine for job creation. If Puerto Rico reduced its 46-percent software piracy rate by 10 points, the industry could grow to nearly \$850 million by 2009, creating new opportunities for entrepreneurs and new jobs for Puerto Rico's workforce.

IT Sector Could Generate More Jobs and Tax Revenues

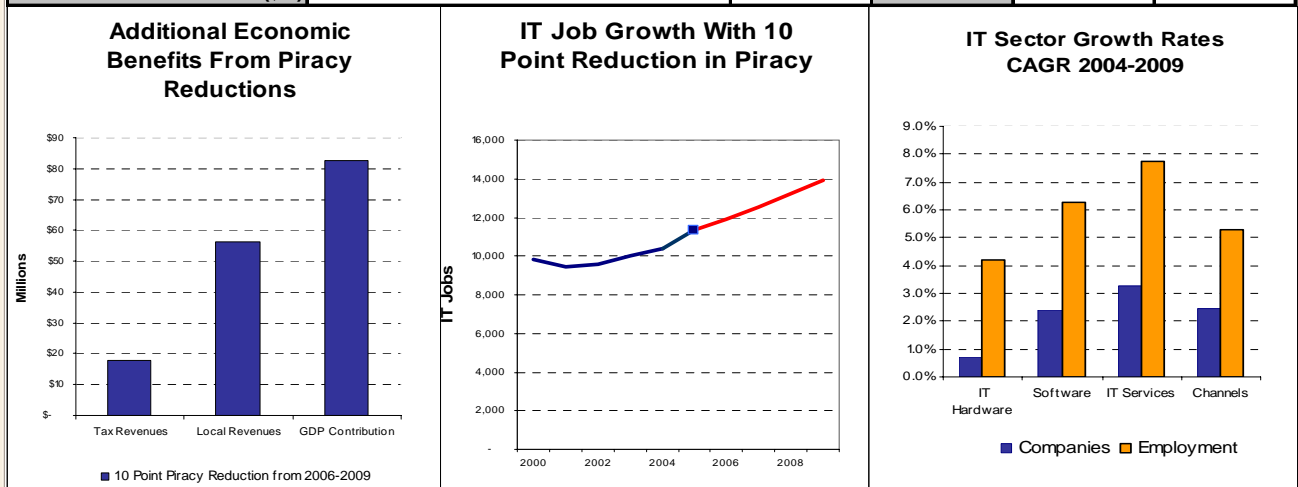
Decreasing Puerto Rico's piracy rate to 36 percent would add \$83 million to its economy, create hundreds more new jobs, and increase local industry revenues by more than \$56 million. That, in turn, would generate an additional \$18 million in tax revenue to help fuel Puerto Rico's tax treasury.

Transforming IT Into an Engine for Economic Growth

A relatively low 46-percent piracy rate helped increase demand for software, which grew by 46 percent between 2000 and 2004. Strong software growth helped Puerto Rico's emerging IT sector grow — adding \$41 million in new software revenues alone to the economy, and creating more than 550 new IT jobs between 2000 and 2004. Decreasing Puerto Rico's piracy rate to 36 percent would help increase the size of Puerto Rico's IT sector by nearly 50 percent — becoming an \$844-million and nearly 14,000-employee driver of economic prosperity.

Puerto Rico's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	USD Millions	USD Millions	USD Millions	USD Millions	USD Millions	CAGR
IT Hardware	\$ 394	394	\$ 391	391	\$ 520	520	5.9%
Software	\$ 35	35	\$ 52	52	\$ 78	78	8.6%
IT Services	\$ 94	94	\$ 132	132	\$ 220	220	10.7%
Total IT Revenue	\$ 523	523	\$ 575	575	\$ 818	818	7.3%

Puerto Rico's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 617	\$ 707	\$ 1,036	\$ 1,070	\$83	46.6%	51.5%
Jobs	9,819	10,401	13,660	13,908	248	31.3%	33.7%
IT Tax Revenues (\$M)	\$ 359	\$ 436	\$ 614	\$ 622	\$18	40.9%	42.6%



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URUGUAY

Uruguay's Emerging IT Sector Could Grow to \$250 Million, Adding Hundreds of Jobs and \$5 Million in Tax Revenues

Hampered by high software piracy, Uruguay's IT sector stands to grow from \$167 million today to over \$250 million by 2009 if the country can cut its 71 percent piracy rate by 10 points. A reduction of that size would help Uruguay unleash the creative potential of its entrepreneurs, who, in turn, could employ hundreds more of Uruguay's workers in high tech jobs.

Cutting Piracy Could Boost Economic Growth

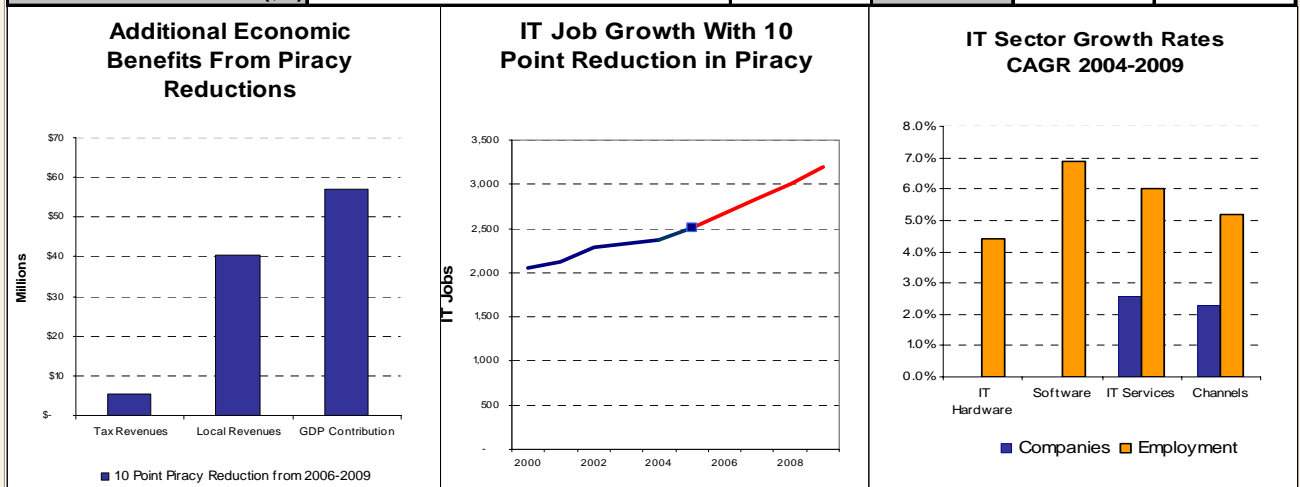
A 10-point drop in Uruguay's piracy rate could create 144 jobs and pump \$57 million into the economy. It could also increase local industry revenues by more than \$41 million and generate \$5 million in additional tax revenues.

Software Could Fuel Economic Acceleration

A high piracy rate has kept Uruguay's software sector small. However, the software sector, poised to lead IT sector growth, can help deliver profound new benefits. Reducing software piracy by 10 points would help increase the size of Uruguay's IT sector — driving a \$320-million, 3,200 employee IT-enabled economy by 2009.

Uruguay's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	UYU Millions	USD Millions	UYU Millions	USD Millions	UYU Millions	CAGR
IT Hardware	\$ 107	3,067	\$ 110	3,168	\$ 149	4,264	6.1%
Software	\$ 16	470	\$ 18	528	\$ 29	824	9.3%
IT Services	\$ 35	1,004	\$ 39	1,105	\$ 58	1,661	8.5%
Total IT Revenue	\$ 158	4,540	\$ 167	4,800	\$ 235	6,749	7.1%

Uruguay's IT Economic Benefits							Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction					
Contribution to GDP* (\$M)	\$ 195	\$ 207	\$ 296	\$ 320	\$57	42.6%	54.2%		
Jobs	2,051	2,366	3,053	3,197	144	29.0%	35.1%		
IT Tax Revenues (\$M)	\$ 21	\$ 23	\$ 33	\$ 35	\$5	42.6%	52.3%		



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VENEZUELA

Venezuela Could Grow Its IT Sector and Pump Millions Into Its Economy

A high software-piracy rate has hindered Venezuela's IT sector growth and the economic benefits it delivers. However, a 10-point cut in its 79-percent software piracy rate would help Venezuela's emerging billion-dollar IT sector grow to \$1.6 billion by 2009, creating new business opportunities, jobs, and taxes.

Reducing Piracy Can Prime the Economic Pump

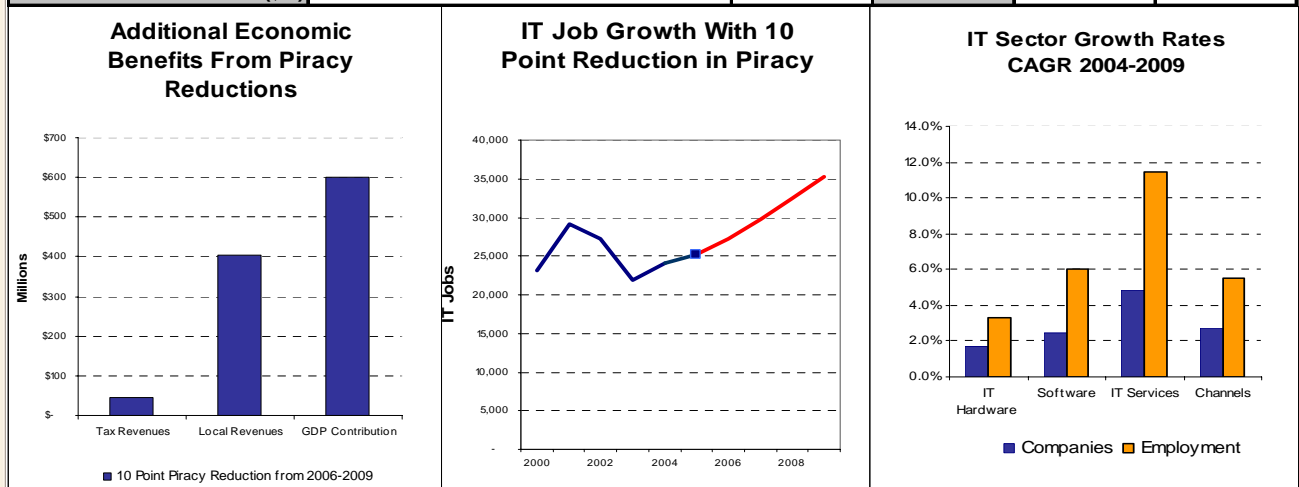
Decreasing Venezuela's 79-percent piracy rate to 69 percent could add \$600 million to its economy, increase local industry revenues by more than \$400 million, and pump an additional \$45 million into Venezuela's tax coffers. The 10-point reduction could also create 2,400 new IT jobs.

An IT Sector Poised to Deliver Enormous Opportunity

With a high software-piracy rate stifling growth opportunities, Venezuela's software sector actually shrank by 9 percent a year between 2000 and 2004. Yet, Venezuela stands to gain some of the greatest future benefits from a 10-point reduction in piracy. Combining its innovative workforce with reductions in software piracy, Venezuela could generate more than 11,000 new IT jobs, create \$127 million in extra tax revenues, and add an additional \$1 billion to its IT economy by 2009.

Venezuela's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	VEB Millions	USD Millions	VEB Millions	USD Millions	VEB Millions	CAGR
IT Hardware	\$ 974	1,835,852	\$ 595	1,121,221	\$ 743	1,400,926	4.6%
Software	\$ 289	544,342	\$ 194	366,496	\$ 291	548,728	8.4%
IT Services	\$ 518	975,704	\$ 189	355,682	\$ 394	743,055	15.9%
Total IT Revenue	\$ 1,781	3,355,898	\$ 978	1,843,399	\$ 1,429	2,692,709	7.9%

Venezuela's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 2,333	\$ 1,206	\$ 1,871	\$ 2,122	\$600	55.1%	75.9%
Jobs	23,087	24,089	32,799	35,231	2,432	36.2%	46.3%
IT Tax Revenues (\$M)	\$ 267	\$ 173	\$ 255	\$ 274	\$45	47.4%	58.3%



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ALBANIA

Albania's \$54 Million IT Sector Could More than Double — Creating New Jobs and Opportunities

Cutting Albania's 78-percent piracy rate by 10 points could help Albania's IT sector grow from \$54 million today to \$127 million by 2009, creating new opportunities for entrepreneurs and new jobs for Albania's workforce.

Battling Piracy Would Fuel the Economy

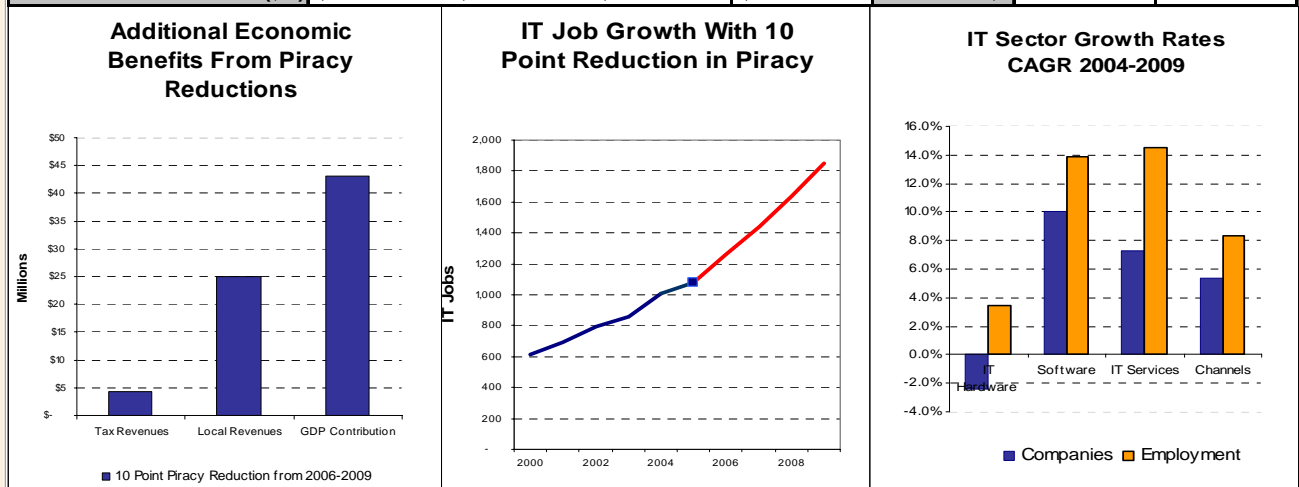
Cutting Albania's piracy rate from 78 percent to 68 percent could add \$43 million to its economy, increase local industry revenues by \$25 million, generate an additional \$4 million in tax revenues, and create more than 200 new jobs.

Software Could Stimulate Economic Potential

High software piracy has helped thwart IT sector benefits and has left Albania with one of the smallest IT sectors among non-EU European countries both in size and as a percentage as of its GDP. Albania's IT sector now consists only of 130 businesses, employing 1,000 people, and generating only \$8 million a year in direct taxes. However, Albania's IT sector is now poised to see rapid growth. By further reducing its software piracy rate, Albania's software sector will lead IT sector growth and help double the size of its IT sector by 2009.

Albania's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	ALL Millions	USD Millions	ALL Millions	USD Millions	ALL Millions	CAGR
IT Hardware	\$ 22	2,349	\$ 39	4,147	\$ 77	8,202	14.6%
Software	\$ 2	214	\$ 7	748	\$ 17	1,792	19.1%
IT Services	\$ 5	534	\$ 8	830	\$ 18	1,927	18.3%
Total IT Revenue	\$ 29	3,097	\$ 54	5,725	\$ 112	11,921	15.8%

Albania's IT Economic Benefits							Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction					
Contribution to GDP* (\$M)	\$ 31	\$ 57	\$ 124	\$ 143	\$43	115.4%	148.7%		
Jobs	616	1,008	1,634	1,853	219	62.1%	83.8%		
IT Tax Revenues (\$M)	\$ 3	\$ 8	\$ 16	\$ 18	\$4	119.8%	145.4%		



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KAZAKHSTAN

Kazakhstan's IT Sector Could Grow Four Times Larger — Pumping Millions Into Its Economy and Creating Thousand of New Jobs

Having already doubled its IT sector since 2000, Kazakhstan is now poised to see the fastest IT sector growth of all countries in the global survey, growing four times larger in just four years. If Kazakhstan reduces its 85 percent software piracy rate by 10 points, its IT sector could grow from \$250 million today to more than \$1.1 billion by 2009.

Reductions in Piracy Could Further Boost Kazakhstan's Economy

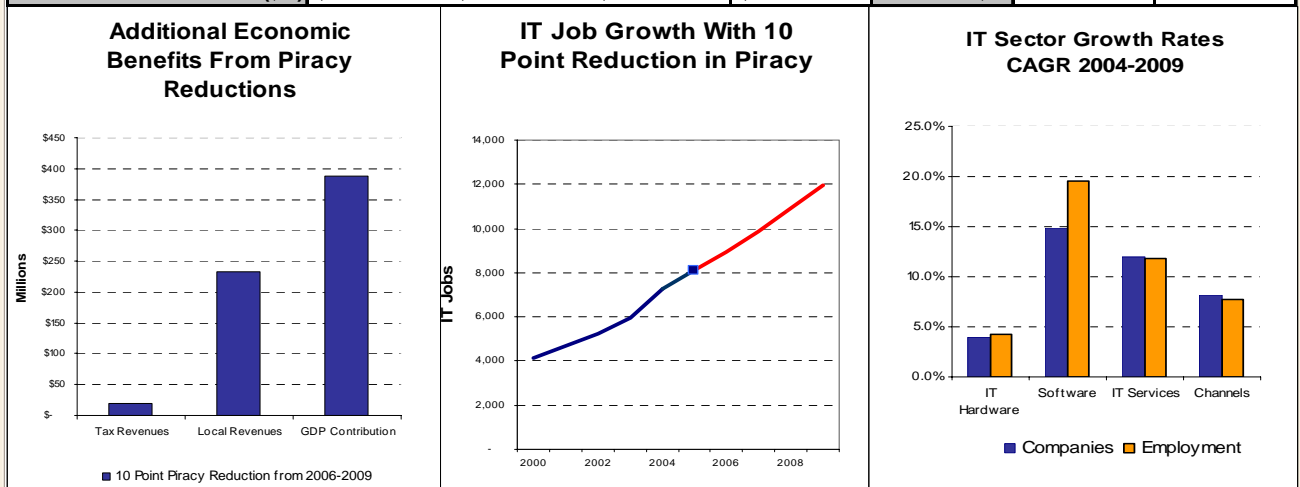
Decreasing Kazakhstan's piracy rate to 75 percent would add \$387 million to its economy, create 1,100 more IT jobs, and increase local industry revenues by more than \$230 million. That, in turn, would generate an additional \$18 million in tax revenue to help the Kazakhstan government pay for public benefits and services.

Fast Software Growth Promises Enormous Benefits

Between 2000 and 2004, a 140 percent increase in software demand helped Kazakhstan's IT sector create tangible economic benefits — 3,100 new IT jobs since 2000 as \$28 million in new software revenues alone was pumped into its economy. Together with a growing IT sector, further reductions in software piracy rate would help Kazakhstan generate another 4,700 IT jobs, create \$64 million a year in extra tax revenues, and add \$1.1 billion a year to an already growing IT-enabled economy by 2009.

Kazakhstan's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	KZT Millions	USD Millions	KZT Millions	USD Millions	KZT Millions	CAGR
IT Hardware	\$ 98	13,785	\$ 194	27,284	\$ 721	101,512	30.1%
Software	\$ 10	1,394	\$ 24	3,388	\$ 100	14,022	32.9%
IT Services	\$ 14	1,964	\$ 35	4,894	\$ 169	23,838	37.3%
Total IT Revenue	\$ 122	17,143	\$ 253	35,566	\$ 990	139,372	31.4%

Kazakhstan's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 137	\$ 291	\$ 1,189	\$ 1,369	\$387	308.5%	370.4%
Jobs	4,151	7,295	10,867	11,987	1,120	49.0%	64.3%
IT Tax Revenues (\$M)	\$ 9	\$ 23	\$ 79	\$ 87	\$18	237.2%	273.8%



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BOSNIA

Cutting Piracy Could Help Transform Bosnia's \$100 Million IT Sector Into a \$187-Million Engine for Opportunity

Hampered by high software-piracy rates, Bosnia's IT sector could grow from \$102 million today to \$177 million by 2009 if the country can cut its 70-percent piracy rate by 10 points. A reduction of that size would help Bosnia unleash the creative potential of its entrepreneurs, who, in turn, could employ more Bosnians in high-wage jobs.

Controlling Piracy Can Stimulate Economic, Job, and Tax Growth

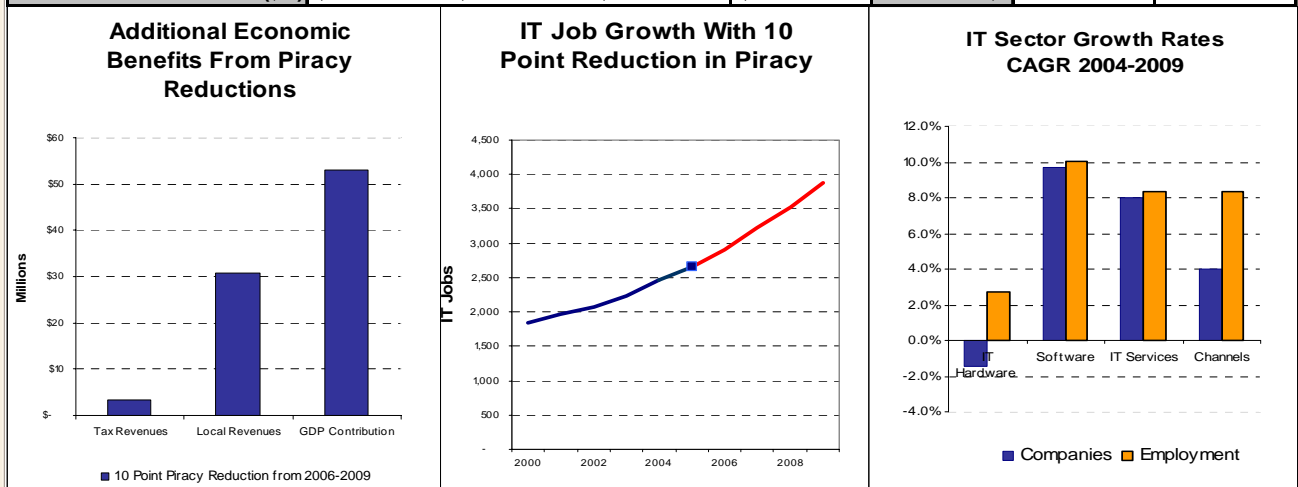
Decreasing Bosnia's piracy rate to 60 percent would add \$53 million to its economy, create 235 more jobs, and increase local industry revenues by more than \$30 million. That, in turn, would generate an additional \$3 million in tax revenue to help the Bosnian government pay for public benefits and services.

Software Growth: A Proven Economic Engine.

A traditionally high piracy rate has thwarted the powerful potential of Bosnia's emerging IT sector. Nonetheless, demand for software grew 67 percent since 2000, helping the IT sector add \$69 million in new revenues to the economy and create more than 600 new IT jobs. Bosnia's 300 IT businesses and nearly 2,500 IT employees could be just the beginning. With the help of piracy cuts, Bosnia's IT sector could generate 1,400 more IT jobs, create \$14 million a year in extra tax revenues, and add \$97 million a year to an already growing IT-enabled economy by 2009.

Bosnia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	BAM Millions	USD Millions	BAM Millions	USD Millions	BAM Millions	CAGR
IT Hardware	\$ 40	65	\$ 67	110	\$ 113	183	10.8%
Software	\$ 10	16	\$ 17	27	\$ 29	48	11.9%
IT Services	\$ 17	28	\$ 18	29	\$ 28	45	9.2%
Total IT Revenue	\$ 67	109	\$ 102	166	\$ 169	276	10.7%

Bosnia's IT Economic Benefits							Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction					
Contribution to GDP* (\$M)	\$ 79	\$ 113	\$ 189	\$ 210	\$53	67.6%	87.0%		
Jobs	1,851	2,467	3,642	3,877	235	47.6%	57.2%		
IT Tax Revenues (\$M)	\$ 5	\$ 8	\$ 22	\$ 24	\$3	169.3%	187.2%		



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BULGARIA

Bulgaria's Emerging \$300-Million IT Sector Could More Than Double in Size — Creating 7000 New Jobs

Held back by its high software-piracy rate, Bulgaria's IT sector could more than double in size from \$300 million today to \$622 million by 2009 if the country can cut its 71-percent piracy rate by 10 points. A 10-point piracy rate reduction would help Bulgaria unleash the creative potential of its entrepreneurs, who, in turn, could employ nearly 22,500 employees in high-wage jobs by 2009.

Cutting Piracy Could Fuel the Economy

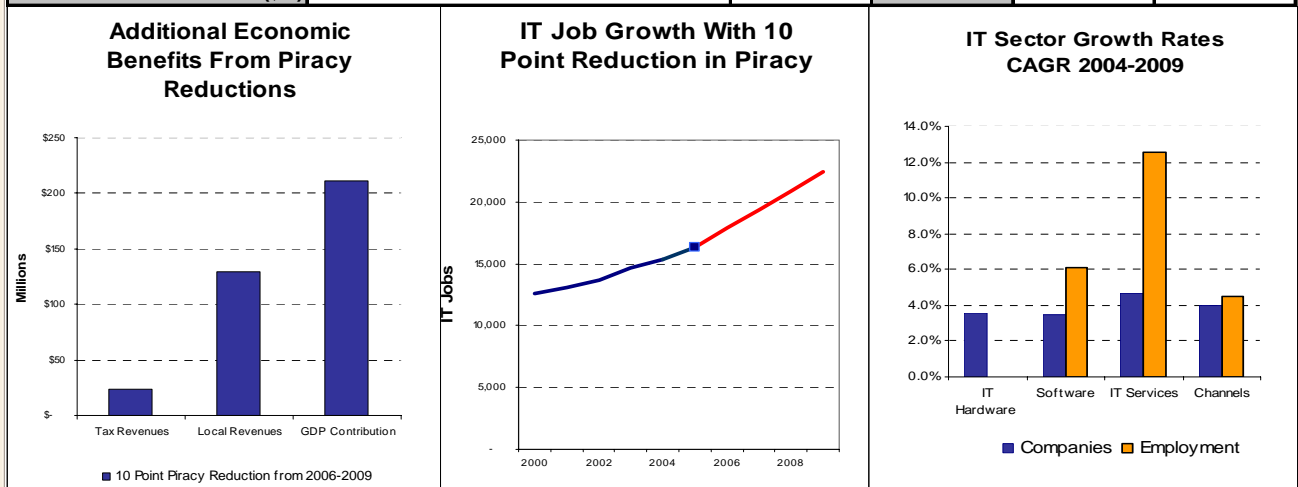
Cutting Bulgaria's piracy rate from 71 percent to 61 percent could add \$212 million to its economy, increase local industry revenues by nearly \$130 million, and pump an additional \$23 million into Bulgaria's tax coffers. The 10-point reduction could also create more than 2,000 new IT jobs.

An IT Sector Poised for Unprecedented Growth

Although high piracy has long hindered the growth of the software sector, between 2000 and 2004 demand for software grew by 78 percent. Now Bulgaria's budding IT sector is poised for unprecedented growth as it becomes an information-age economy. With the help of a 10-point drop in piracy by 2009, Bulgaria's IT sector could produce 103-percent growth and increase its IT workforce from 15,000 to more than 22,000 employees.

Bulgaria's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	BGN Millions	USD Millions	BGN Millions	USD Millions	BGN Millions	CAGR
IT Hardware	\$ 127	200	\$ 203	319	\$ 361	568	12.2%
Software	\$ 28	44	\$ 49	78	\$ 88	139	12.2%
IT Services	\$ 36	57	\$ 55	87	\$ 103	162	13.3%
Total IT Revenue	\$ 191	300	\$ 307	484	\$ 552	869	12.4%

Bulgaria's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 231	\$ 371	\$ 681	\$ 769	\$212	83.3%
Jobs	12,595	15,401	20,434	22,466	2,032	32.7%	45.9%
IT Tax Revenues (\$M)	\$ 47	\$ 69	\$ 33	\$ 38	\$23	-53.0%	-45.5%



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CROATIA

Croatia's Vibrant \$600-Million IT Sector Could Expand to \$1 Billion and Generate Another 4,600 High Tech Jobs

Growing demand for software has helped propel Croatia's IT sector into a dynamic \$600-million-a-year driver of economic benefits. If the country further reduced its 58-percent piracy rate by 10 points, its IT industry could grow to well over \$1 billion a year by 2009.

Reducing Piracy Could Accelerate Tech Sector Benefits

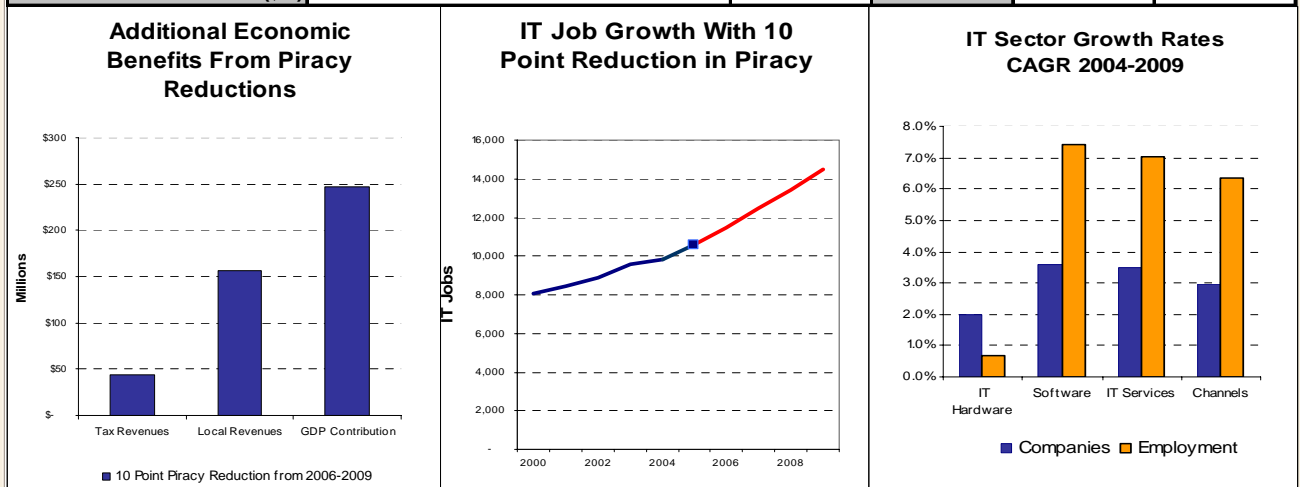
A 10-point drop in Croatia's piracy rate could create more than 1,000 new IT jobs and pump \$247 million into the economy. It could also increase local industry revenues by more than \$150 million and generate \$63 million in additional tax revenues.

Software Could Drive Future IT Growth

Over the last four years, demand for software grew by more than 50 percent. Commercial software sales now account for nearly one of every five IT dollars spent in the country. The IT sector, already representing a full 2 percent of the country's overall economy, is projected to expand to more than 2.5 percent of Croatia's GDP by 2009 with software leading IT-sector growth.

Croatia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	HRK Millions	USD Millions	HRK Millions	USD Millions	HRK Millions	CAGR
IT Hardware	\$ 203	1,274	\$ 345	2,165	\$ 481	3,022	6.9%
Software	\$ 72	454	\$ 110	691	\$ 193	1,211	11.9%
IT Services	\$ 76	478	\$ 146	919	\$ 255	1,598	11.7%
Total IT Revenue	\$ 351	2,206	\$ 601	3,775	\$ 929	5,832	9.1%

Croatia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 442	\$ 773	\$ 1,229	\$ 1,333	\$247	58.9%	72.4%
Jobs	8,070	9,844	13,398	14,464	1,066	36.1%	46.9%
IT Tax Revenues (\$M)	\$ 116	\$ 207	\$ 317	\$ 324	\$43	53.0%	56.3%



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CZECH REPUBLIC

The Czech Republic's IT Sector, Already Benefiting From Eastern Europe's Lowest Piracy Rate, Could Grow 60 Percent and Add 19,000 New Jobs

Low software piracy has already helped the Czech Republic translate growth in its IT sector into tangible economic benefits, creating more than 13,000 new high tech jobs since 2000. If the Czech Republic further reduced its 41-percent piracy rate by 10 points, its IT sector could grow from 2.7 billion a year to \$4.3 billion by 2009.

Opportunity Abounds For Czech Republic

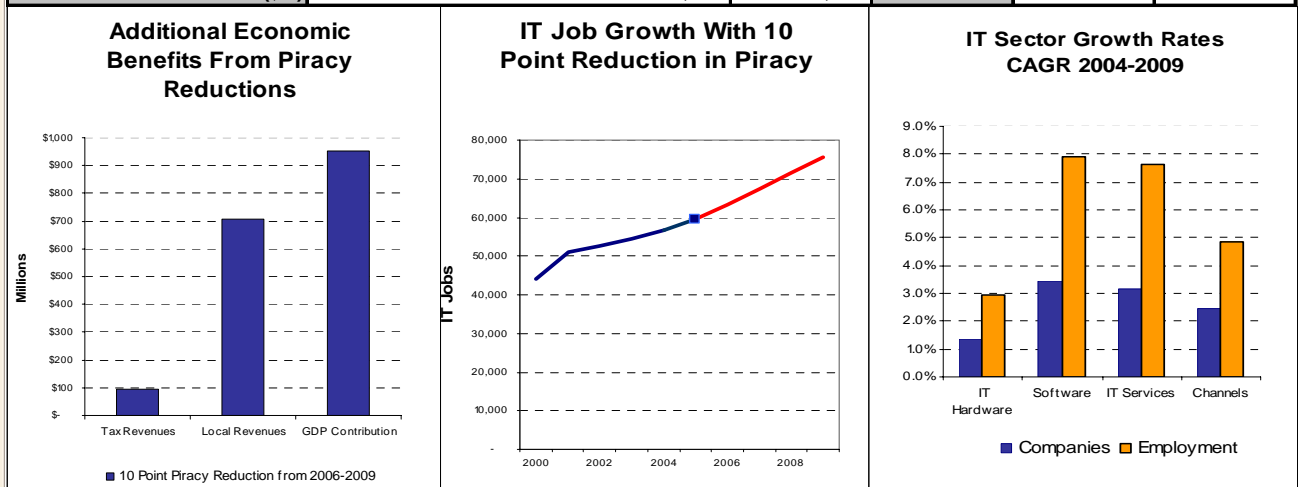
Cutting the Czech Republic's piracy rate from 41 percent to 31 percent could add \$950 million to its economy, increase local industry revenues by more than \$700 million, and pump an additional \$96 million into Czech Republic's tax coffers. The 10-point reduction could also create 2,900 new IT jobs.

Software Will Fuel Economic Acceleration

The Czech Republic's software sector grew 71 percent and the IT sector added \$536 million in new software revenues alone to the economy since 2000. Now as the software sector is projected to lead future IT growth, further piracy reductions could help the IT sector grow 58 percent — over 10 points faster than it could without the piracy cuts. Such growth would enable the 56,000-employee IT sector to grow 75,000 strong by 2009.

Czech Republic's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	CZK Millions	USD Millions	CZK Millions	USD Millions	CZK Millions	CAGR
IT Hardware	\$ 988	25,420	\$ 1,217	31,319	\$ 1,489	38,301	4.1%
Software	\$ 317	8,144	\$ 542	13,946	\$ 916	23,568	11.1%
IT Services	\$ 565	14,542	\$ 988	25,427	\$ 1,634	42,035	10.6%
Total IT Revenue	\$ 1,870	48,106	\$ 2,748	70,692	\$ 4,039	103,904	8.0%

Czech Republic's IT Economic Benefits							Total Piracy Reduction Benefit	04-09 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction		2004-2009 Growth			
Contribution to GDP* (\$M)	\$ 2,474	\$ 3,800	\$ 5,784	\$ 6,192	\$952	52.2%	62.9%		
Jobs	44,002	56,708	72,803	75,706	2,903	28.4%	33.5%		
IT Tax Revenues (\$M)	\$ 557	\$ 823	\$ 1,403	\$ 1,445	\$96	70.4%	75.5%		



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ESTONIA

Estonia Could Boost IT Jobs by the Thousands, Pump Millions Into Its Economy

Strong demand for software and services has helped Estonia's IT sector grow to \$225 million a year. If Estonia reduced its 55-percent software piracy rate by 10 points, the industry could grow to \$355 million by 2009, creating new opportunities for entrepreneurs and new jobs for Estonia's workforce.

Cutting Piracy Could Deliver Major Economic Benefits

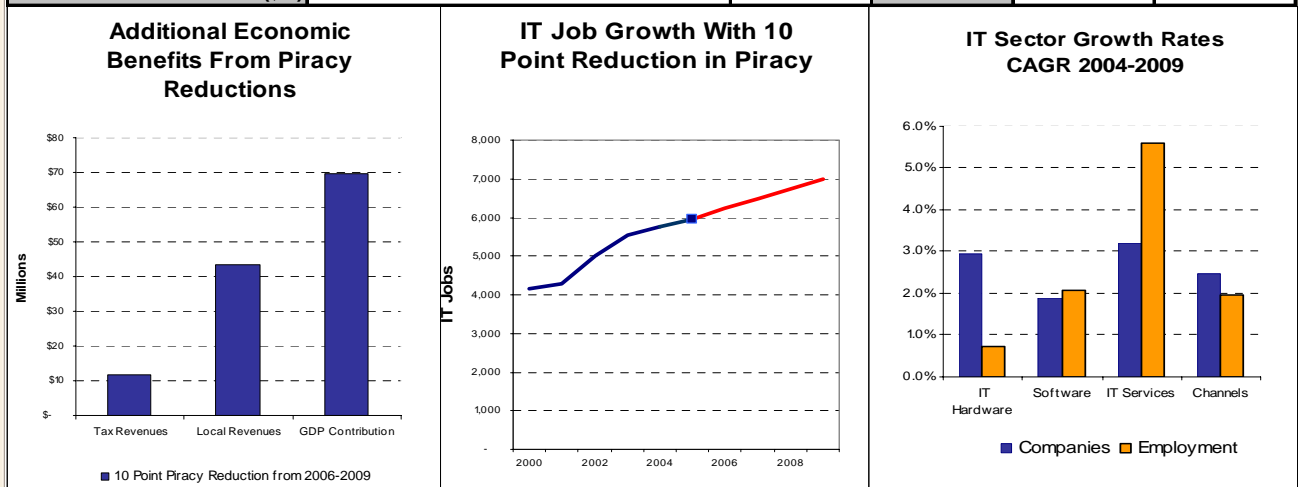
Estonia could add nearly \$70 million to its economy, create roughly 330 technology jobs, increase local industry revenues by \$44 million, and generate an additional \$12 million in tax revenues — all by decreasing the country's piracy rate from 55 percent to 45 percent.

Faster IT Growth Promises New Opportunities

Strong demand for software and IT services has helped increase domestic IT revenues 13 percent a year on average, adding \$40 million in software revenues alone to the economy and creating nearly 1,600 additional IT jobs between 2000 and 2004. Estonia's IT sector now consists of more than 650 businesses, employing more than 5,700 people and generating almost \$77 million a year in direct and indirect taxes. By further reducing its software piracy rate, Estonia could add another 1,200 high tech jobs by 2009 — the equivalent of doubling the number of current software and hardware jobs.

Estonia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EEK Millions	USD Millions	EEK Millions	USD Millions	EEK Millions	CAGR
IT Hardware	\$ 83	1,051	\$ 130	1,635	\$ 183	2,306	7.1%
Software	\$ 26	322	\$ 40	504	\$ 56	702	6.9%
IT Services	\$ 31	391	\$ 55	695	\$ 94	1,181	11.2%
Total IT Revenue	\$ 140	1,765	\$ 225	2,834	\$ 332	4,189	8.1%

Estonia's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 174	\$ 285	\$ 431	\$ 460	\$69	51.4%
Jobs	4,158	5,756	6,660	6,989	329	15.7%	21.4%
IT Tax Revenues (\$M)	\$ 49	\$ 77	\$ 120	\$ 125	\$12	55.9%	62.2%



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SERBIA-MONTENEGRO

Serbia and Montenegro's \$380 Million IT Sector Could More Than Double — Creating New Jobs and Opportunities

Strong demand for software and services has helped the Serbia-Montenegro IT sector grow to \$381 million. If Serbia and Montenegro reduced their 81 percent software piracy rate by 10 points, the IT industry could grow to nearly \$860 million by 2009, creating new opportunities for entrepreneurs and new jobs for the Serbia-Montenegro workforce.

Reducing Piracy Could Pump Millions More Into the Economy

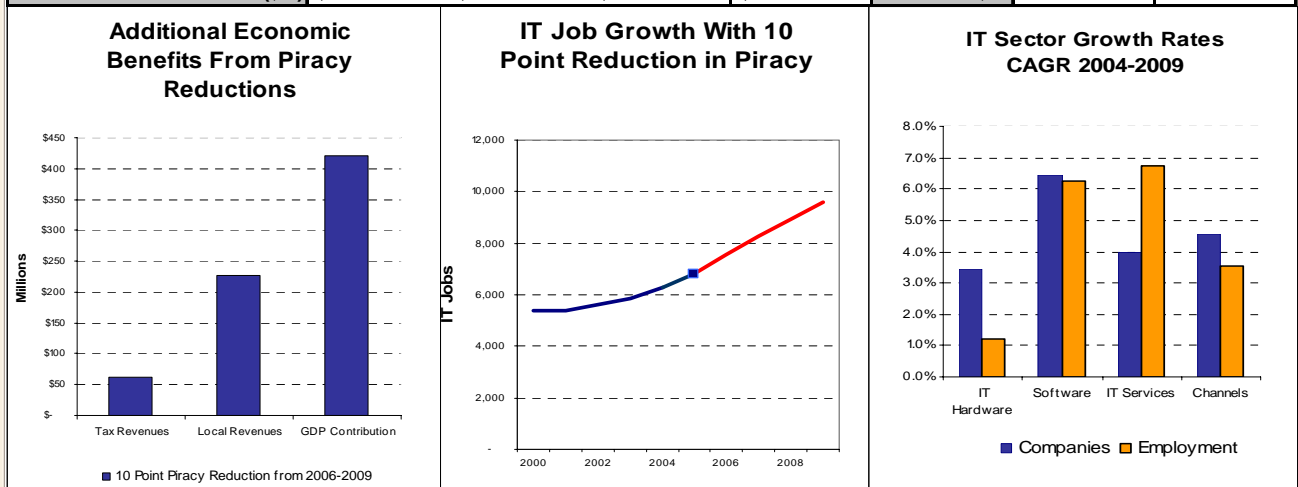
A 10-point drop in Serbia-Montenegro's 81 percent piracy rate could create 1,800 jobs and pump \$420 million into the economy. It could also increase local industry revenues by an estimated \$227 million and generate \$63 million in additional tax revenues.

Fast Software Growth Promises Enormous Benefits

Between 2000 and 2004, demand for software grew 84 percent — faster than other segments of the IT sector. This software growth helped the IT sector add \$43 million in new software revenues alone to the economy and create more than 880 new IT jobs between 2000 and 2004. The region's software sector is now poised to lead IT sector growth with an impressive 20 percent per year average growth rate over the next four years. By further reducing its software piracy rate, Serbia-Montenegro could further accelerate benefits and its future IT sector growth — growing 125 percent instead of 88 percent between 2004 and 2009.

FRY's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EUR Millions	USD Millions	EUR Millions	USD Millions	EUR Millions	CAGR
IT Hardware	\$ 156	125	\$ 250	201	\$ 438	353	11.9%
Software	\$ 27	22	\$ 50	41	\$ 126	102	20.1%
IT Services	\$ 48	38	\$ 81	65	\$ 152	122	13.5%
Total IT Revenue	\$ 231	186	\$ 381	307	\$ 716	577	13.4%

FRY's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 280	\$ 466	\$ 885	\$ 1,058	\$420	89.7%	126.9%
Jobs	5,382	6,263	7,778	9,590	1,812	24.2%	53.1%
IT Tax Revenues (\$M)	\$ 54	\$ 82	\$ 172	\$ 198	\$63	110.6%	142.2%



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HUNGARY

Benefiting From Piracy Cuts, Hungary's Thriving IT Sector Could Add Another \$1.2 Billion to the Economy

A thriving software sector has helped Hungary's IT sector grow into a \$2.1-billion industry. Reducing Hungary's 44 percent piracy rate by 10 percentage points would help the industry grow to \$3.3 billion by 2009.

Further Cuts in Piracy Could Add New Jobs and More Benefits

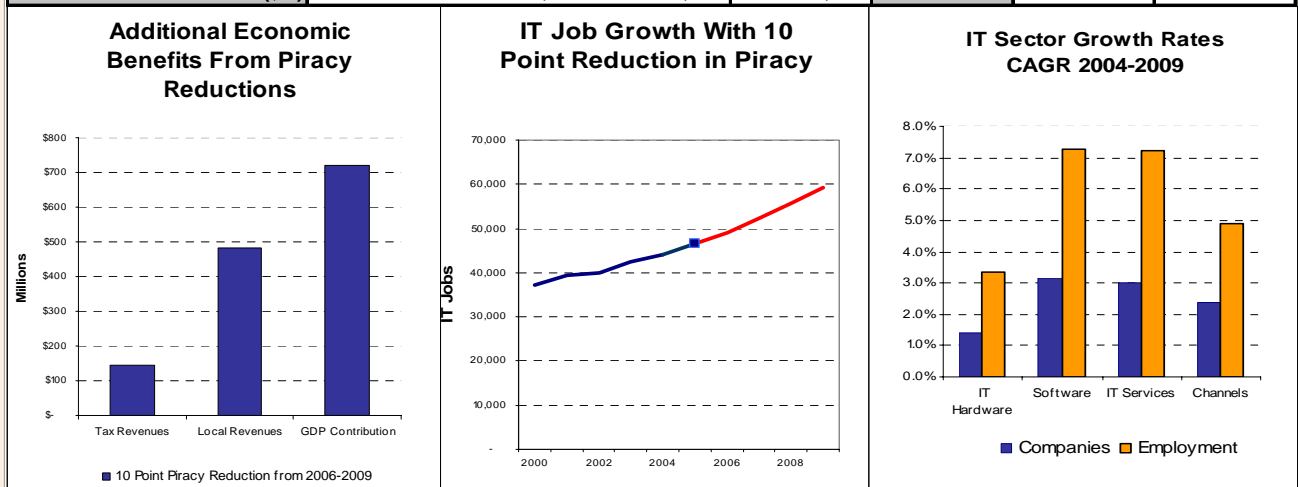
Cutting Hungary's piracy rate from 44 percent to 34 percent could add \$720 million to its economy, increase local industry revenues by more than \$480 million, and pump an additional \$145 million into Hungary's tax treasury. The 10-point reduction could also create nearly 2,500 new IT jobs.

Software Will Continue to Fuel Economic Growth

Hungary's IT sector created 6,700 high-wage technology jobs in the last four years. With the software sector positioned to lead future IT growth, the IT sector could grow 55 percent instead of the estimated 45 percent growth from a further drop in Hungary's software piracy rate by 2009. The economic stimulus resulting from this faster IT growth could help Hungary add a total of 15,000 new jobs by 2009.

Hungary's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	HUF Millions	USD Millions	HUF Millions	USD Millions	HUF Millions	CAGR
IT Hardware	\$ 722	146,578	\$ 967	196,294	\$ 1,214	246,311	4.6%
Software	\$ 290	58,884	\$ 460	93,403	\$ 744	151,060	10.1%
IT Services	\$ 470	95,476	\$ 673	136,573	\$ 1,083	219,765	10.0%
Total IT Revenue	\$ 1,483	300,938	\$ 2,101	426,270	\$ 3,041	617,136	7.7%

Hungary's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,979	\$ 2,821	\$ 4,202	\$ 4,509	\$720	48.9%	59.8%
Jobs	37,298	44,039	56,709	59,192	2,483	28.8%	34.4%
IT Tax Revenues (\$M)	\$ 861	\$ 1,304	\$ 2,010	\$ 2,072	\$145	54.1%	58.8%



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LATVIA

Latvia's Thriving IT Sector Could Grow Over 70 Percent — Creating New Economic Opportunities, Jobs, and Tax Revenues

Having created 2,600 IT jobs in the last four years, Latvia's IT sector could add another 2,000 jobs with the economic stimulus resulting from a 10-point drop in its 58 percent software piracy rate. Cutting piracy would help Latvia's \$230 million IT sector grow to \$400 million by 2009.

Cutting Piracy Could Speed Opportunity

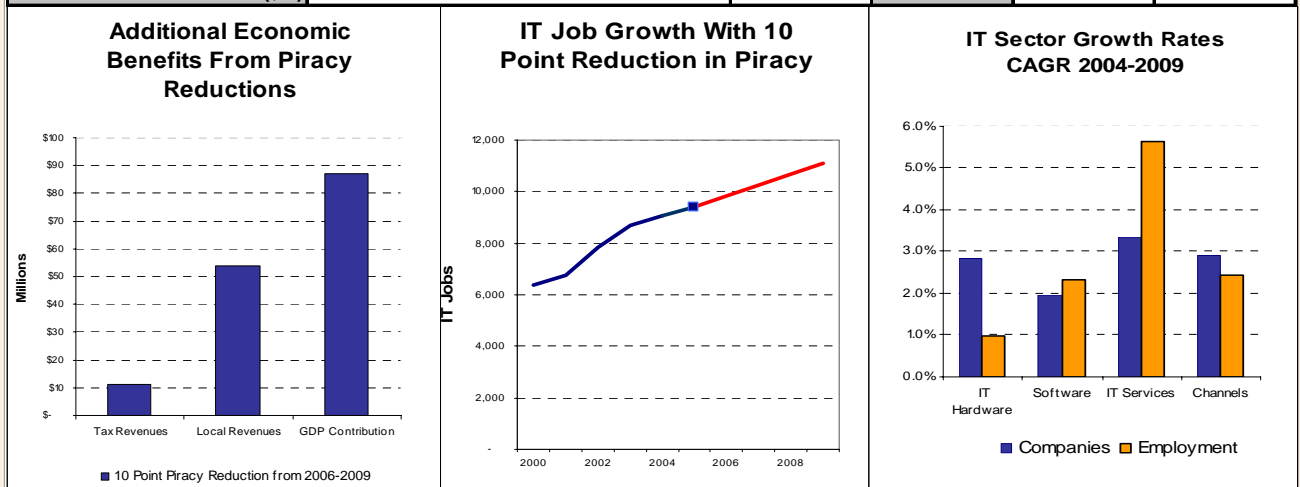
Latvia could add \$87 million to its economy, increase local industry revenues by \$54 million, generate an additional \$11 million in tax revenues, and directly create 500 high-wage technology jobs — by decreasing the country's piracy rate from 58 percent to 48 percent.

Faster IT Growth Around The Corner

Strong commercial software demand has helped the software sector grow 71 percent between 2000 and 2004. This dynamic software growth helped the IT sector, over the same period, add \$45 million in software alone to the economy and create 2,600 additional IT jobs. Decreasing Latvia's piracy rate to 48 percent would help increase the size of Latvia's IT sector by more than 70 percent — becoming a \$400 million and 11,000 employee economic incubator by 2009.

Latvia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	LVL Millions	USD Millions	LVL Millions	USD Millions	LVL Millions	CAGR
IT Hardware	\$ 75	40	\$ 127	68	\$ 203	109	9.8%
Software	\$ 24	13	\$ 41	22	\$ 59	32	7.7%
IT Services	\$ 35	19	\$ 64	34	\$ 109	59	11.3%
Total IT Revenue	\$ 134	72	\$ 232	124	\$ 372	199	9.9%

Latvia's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 171	\$ 300	\$ 485	\$ 521	\$87	61.8%
Jobs	6,395	9,057	10,586	11,097	511	16.9%	22.5%
IT Tax Revenues (\$M)	\$ 41	\$ 71	\$ 109	\$ 114	\$11	52.6%	59.1%



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LITHUANIA

Lithuania's IT Sector Could Generate 2,500 New Jobs and Add \$240 Million to an Already Growing IT Economy

Reducing software piracy from its current 58 percent to 48 percent could help Lithuania's budding IT sector grow from \$275 million today to \$463 million by 2009.

Lower Piracy Means Higher Growth

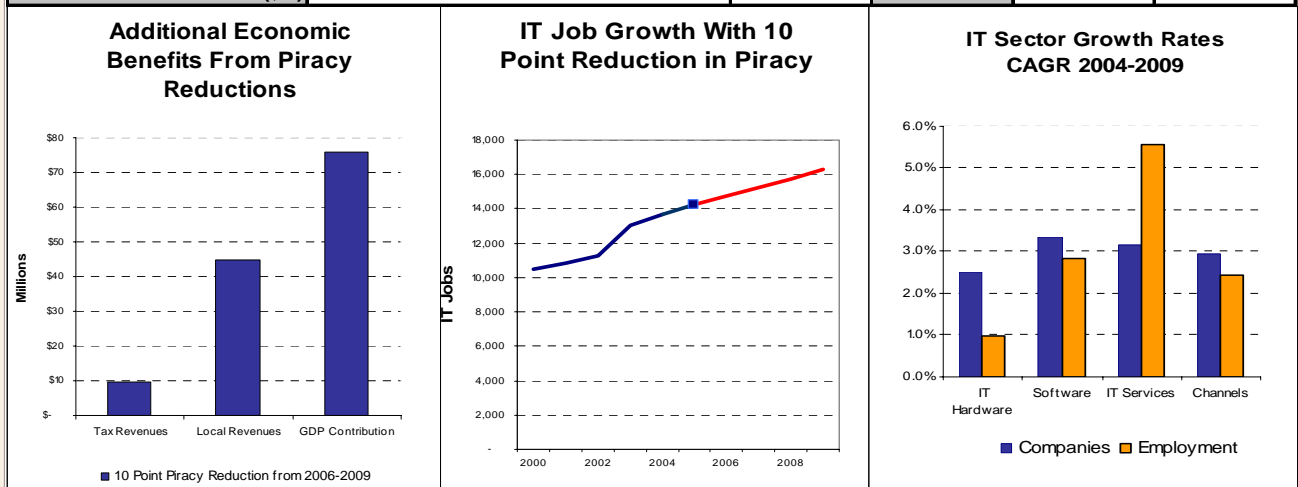
Cutting Lithuania's piracy rate to 48 percent could add \$76 million to its economy, create roughly 480 new jobs, and increase local industry sales by more than \$45 million. For Lithuania's government, the cumulative effect of this growth could mean an additional \$10 million in tax revenues.

IT Sector to Fuel Impressive Growth

At 81 percent, Lithuania enjoyed the fastest software growth among European Union countries between 2000 and 2004. This strong software growth also helped fuel one of the fastest IT sector growth rates — adding \$46 million in new software revenues alone to the economy and creating more than 3,200 new IT jobs since 2000. The IT sector, already representing a full 1.2 percent of the country's overall economy, is projected to expand to more than 1.5 percent of Lithuania's GDP by 2009. Additional cuts in Lithuania's piracy rate would further increase the size of Lithuania's IT sector — helping it become a \$465-million, 16,000 employee industry by 2009.

Lithuania's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	LTL Millions	USD Millions	LTL Millions	USD Millions	LTL Millions	CAGR
IT Hardware	\$ 77	213	\$ 175	486	\$ 275	765	9.5%
Software	\$ 24	68	\$ 44	123	\$ 69	192	9.3%
IT Services	\$ 31	87	\$ 56	156	\$ 95	265	11.1%
Total IT Revenue	\$ 132	367	\$ 275	765	\$ 439	1,221	9.8%

Lithuania's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 166	\$ 337	\$ 542	\$ 574	\$76	61.0%	70.4%
Jobs	10,474	13,711	15,788	16,267	479	15.1%	18.6%
IT Tax Revenues (\$M)	\$ 49	\$ 83	\$ 114	\$ 117	\$10	37.1%	41.9%



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MACEDONIA

Macedonia's \$66 Million IT Sector Could Nearly Double In Size — Creating New Economic Opportunities, Jobs, and Tax Revenues

Macedonia's IT sector has grown into a \$66 million industry employing 1,400 workers. If the country reduced its 72 percent software piracy rate by 10 points, the sector could more than double in size becoming a \$123 million 1,900 employee engine for economic growth by 2009.

Reducing Piracy Is A Tool For Boosting Economic Growth

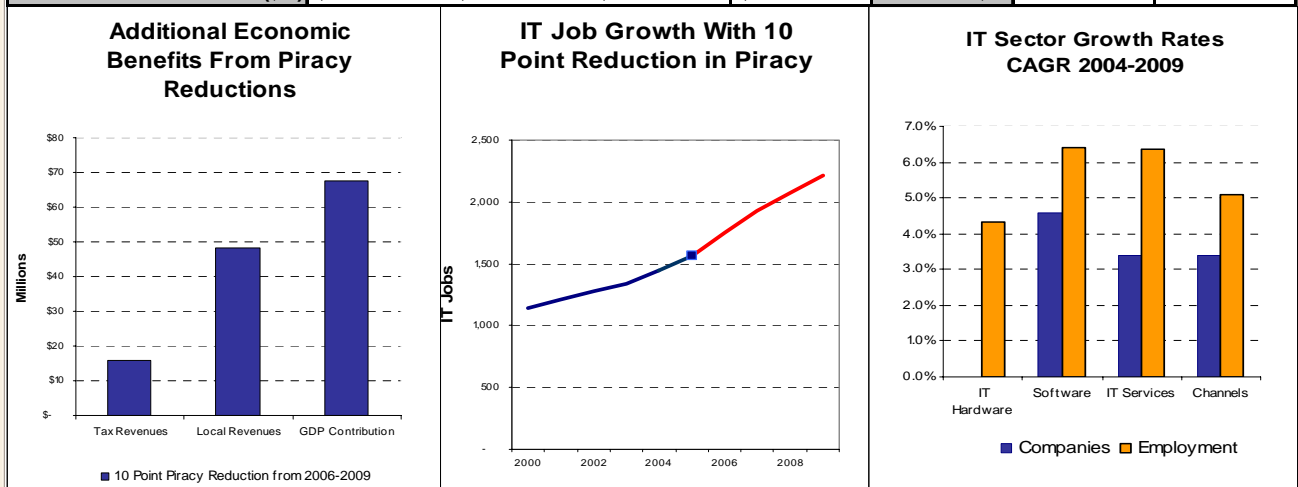
Cutting Macedonia's piracy rate to 62 percent could add \$68 million to its economy, directly create more than 300 new jobs, and increase local industry sales by more than \$48 million. The aggregate effect could mean an additional \$16 million in tax revenues for Macedonia's government.

Software Could Fuel Economic Acceleration

Between 2000 and 2004, software demand grew 45 percent which helped the IT sector grow from \$43 million to \$66 million since 2000. With software and IT services projected to lead future IT sector growth, cutting back its piracy rate by 10 points could help accelerate future IT growth and allow Macedonia's IT sector to grow 86 percent larger instead of 60 percent without piracy cuts.

Macedonia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	MKD Millions	USD Millions	MKD Millions	USD Millions	MKD Millions	CAGR
IT Hardware	\$ 27	1,566	\$ 42	2,477	\$ 63	3,723	8.5%
Software	\$ 7	433	\$ 11	628	\$ 19	1,141	12.7%
IT Services	\$ 9	541	\$ 13	787	\$ 24	1,429	12.7%
Total IT Revenue	\$ 43	2,540	\$ 66	3,892	\$ 107	6,293	10.1%

Macedonia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 53	\$ 81	\$ 133	\$ 161	\$68	65.3%	99.5%
Jobs	1,139	1,448	1,884	2,212	328	30.1%	52.8%
IT Tax Revenues (\$M)	\$ 14	\$ 21	\$ 36	\$ 42	\$16	69.9%	101.5%



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POLAND

Poland's IT Sector Could Become a Thriving, \$7.6 Billion Powerhouse and Add Another 32,000 High Tech Jobs

One of the fastest software growth rates among all European Union countries helped boost Poland's IT sector into a \$4.1 billion a year industry. Reducing its 59 percent piracy rate to 49 percent could help the industry grow to \$7.6 billion by 2009.

Piracy Cuts To Pump Billions into the Economy

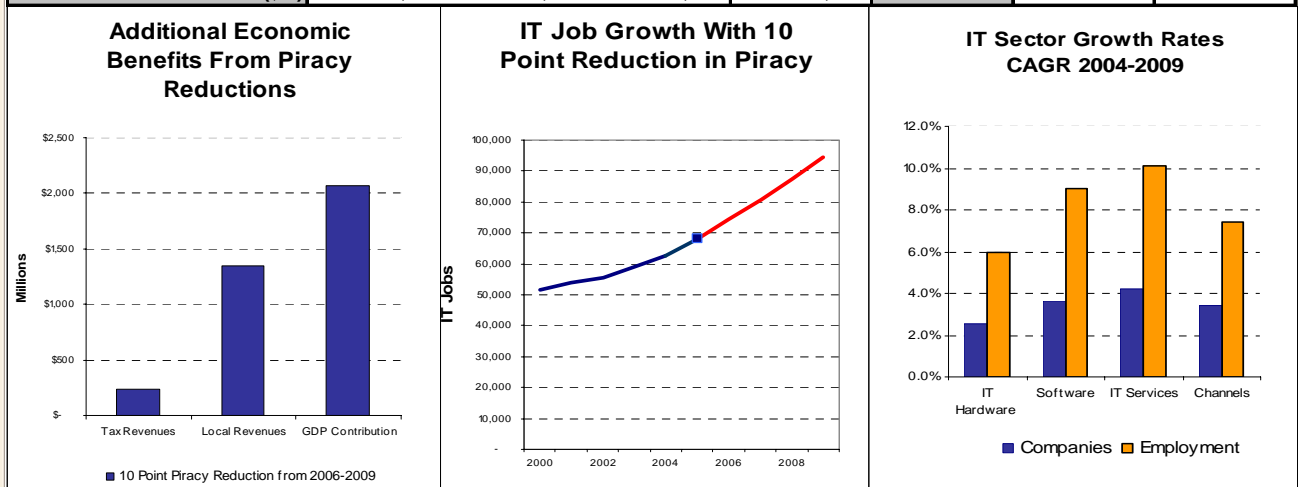
Positioned to see the largest relative benefit among European Union countries, a 10-point drop in Poland's 59 percent piracy rate could create 4,300 jobs and pump \$2 billion into the economy. It could also increase local industry revenues by more than \$1.3 billion and generate \$238 million in additional tax revenues.

Software Could Fuel Economic Acceleration

With growth in the software and IT services sectors averaging above 14 percent a year, the IT sector added \$748 million in new software revenues alone to the economy, and created more than 10,000 new IT jobs between 2000 and 2004. Poland's 10,000 IT businesses now employ more than 62,000 people, and generate \$1.4 billion a year in taxes. By further reducing its software piracy rate, Poland could grow its IT sector by 82 percent and create 32,000 more jobs by 2009.

Poland's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	PLN Millions	USD Millions	PLN Millions	USD Millions	PLN Millions	CAGR
IT Hardware	\$ 1,925	7,029	\$ 2,242	8,188	\$ 3,347	12,225	8.3%
Software	\$ 458	1,673	\$ 773	2,822	\$ 1,395	5,093	12.5%
IT Services	\$ 616	2,252	\$ 1,129	4,124	\$ 2,177	7,951	14.0%
Total IT Revenue	\$ 2,999	10,953	\$ 4,144	15,135	\$ 6,919	25,270	10.8%

Poland's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 3,668	\$ 5,353	\$ 9,227	\$ 10,111	\$2,064	72.4%
Jobs	51,594	62,475	90,366	94,661	4,295	44.6%	51.5%
IT Tax Revenues (\$M)	\$ 1,038	\$ 1,475	\$ 2,569	\$ 2,671	\$238	74.1%	81.0%



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ROMANIA

Romania's Emerging IT Sector Could Nearly Double, Creating New Economic Opportunity, Jobs, and Businesses

Having created 4,000 high-wage technology jobs in the last four years, Romania's IT sector could add another 7,300 jobs with the help of a 10-point drop in its 74 percent software piracy rate. A 10-point piracy cut could also boost Romania's IT sector from \$800 million today to \$1.6 billion by 2009.

Piracy Cuts To Deliver Great New Gains

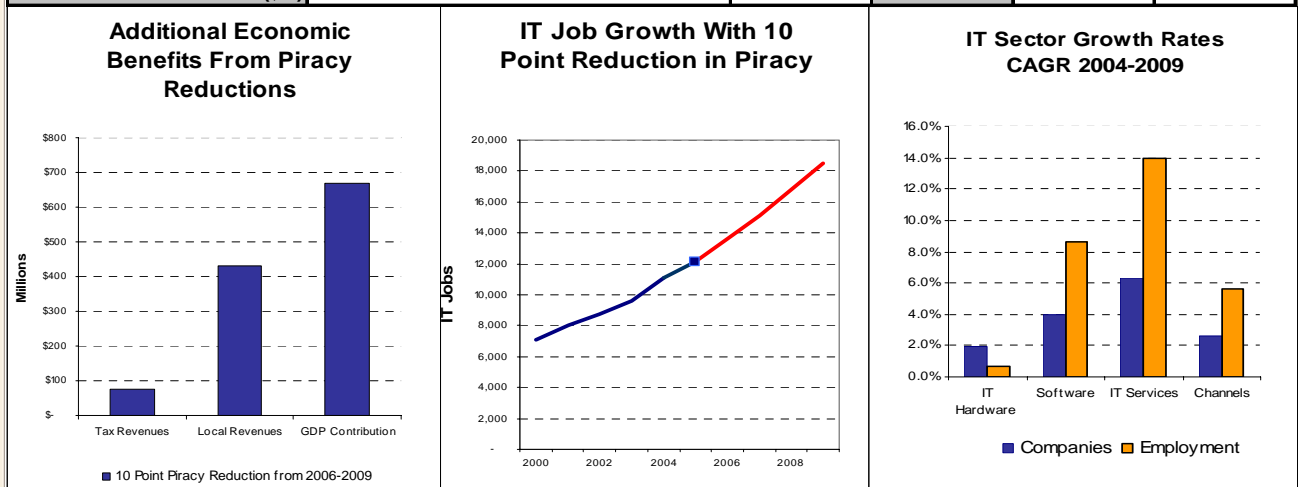
Decreasing Romania's piracy rate from 74 percent to 64 percent could add nearly \$670 million to its economy, increase local industry revenues by more than \$430 million, create 3,000 new jobs, and generate over \$75 million in additional tax revenues.

Software Is Already Fueling IT Growth

Long hindered by high piracy, Romania's emerging software sector nonetheless demonstrated how a 170 percent growth rate between 2000 and 2004 can translate into new economic prosperity for the country. In just the last four years Romania's IT sector added \$174 million in software revenues alone to the economy, and created more than 4,000 new IT jobs. By further reducing its software piracy rate, Romania could accelerate the delivery of new IT jobs and businesses — growing over 90 percent in the IT sector instead of 62 percent between 2004 and 2009.

Romania's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	RON Millions	USD Millions	RON Millions	USD Millions	RON Millions	CAGR
IT Hardware	\$ 245	8,192,353	\$ 560	18,728,876	\$ 790	26,416,990	7.1%
Software	\$ 46	1,541,193	\$ 124	4,160,204	\$ 223	7,455,765	12.4%
IT Services	\$ 78	2,616,471	\$ 134	4,478,264	\$ 313	10,453,520	18.5%
Total IT Revenue	\$ 369	12,350,016	\$ 818	27,367,344	\$ 1,325	44,326,274	10.1%

Romania's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 451	\$ 989	\$ 1,736	\$ 2,017	\$669	75.4%	103.9%
Jobs	7,055	11,134	15,374	18,465	3,091	38.1%	65.8%
IT Tax Revenues (\$M)	\$ 70	\$ 122	\$ 190	\$ 222	\$76	56.5%	82.6%



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RUSSIA

Russia's IT Sector Can Triple In Size, Pump Billions Into the Economy, And Create 100,000 More Jobs

Long stifled by one of the highest piracy rates in the world, Russia's IT sector could triple in size – growing from \$9.2 billion today to \$30 billion in four years – with the help of a reduction in software piracy from its current 87 percent to 77 percent.

Piracy Cuts Could Double High Tech Jobs

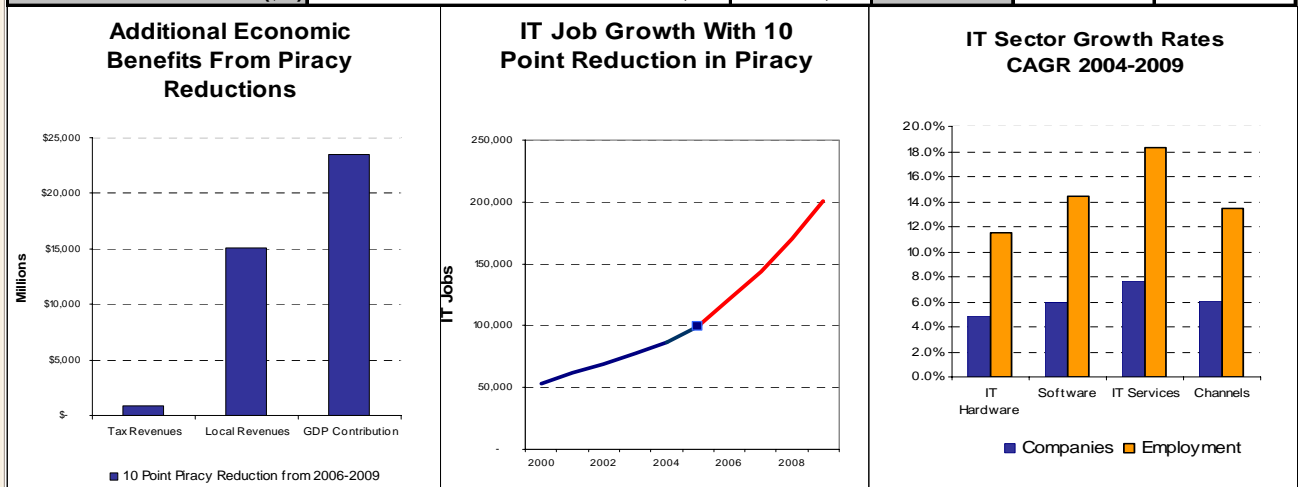
Projected to see the fourth largest benefits in the world, decreasing Russia's piracy rate by 10-points would add \$23.5 billion to its economy, and create 33,700 more new jobs — more jobs than are currently employed in Russia's hardware, software and services sector combined. A 10-point drop could also increase local industry revenues by more than \$15 billion and generate an additional \$823 million in tax revenue to help the Russia government pay for public benefits and services.

One of Largest Potential Beneficiaries In the World

A proven driver of IT sector benefits, Russia's software sector grew two and a half times in size in just the last 4 years. In coming years, the software sector could achieve an impressive 20 percent per year average growth rate. The key to unlocking the full potential of Russia's IT sector can be found in reducing its software piracy rate. Russia could generate 114,000 more IT jobs, create \$1.6 billion in extra tax revenues a year, and add \$27 billion a year to an already growing IT economy by 2009 with the help of piracy cuts.

Russia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	RUB Millions	USD Millions	RUB Millions	USD Millions	RUB Millions	CAGR
IT Hardware	\$ 3,050	87,887	\$ 6,252	180,157	\$ 13,209	380,648	16.1%
Software	\$ 407	11,734	\$ 1,065	30,690	\$ 2,649	76,342	20.0%
IT Services	\$ 681	19,623	\$ 1,898	54,695	\$ 5,880	169,435	25.4%
Total IT Revenue	\$ 4,138	119,244	\$ 9,215	265,541	\$ 21,738	626,425	18.7%

Russia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 4,853	\$ 11,189	\$ 27,692	\$ 38,102	\$23,477	147.5%	240.5%
Jobs	52,856	86,261	167,006	200,742	33,736	93.6%	132.7%
IT Tax Revenues (\$M)	\$ 348	\$ 684	\$ 1,548	\$ 1,912	\$823	126.2%	179.4%



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SLOVAKIA

Slovakia's IT Sector Could Become a \$1.4 Billion Engine For Economic Growth

Nurtured by a lower software piracy rate, Slovakia's IT sector has already expanded into a \$820 million industry. With the help of a 10-point reduction in its 48 software piracy rate, Slovakia's IT sector could grow to \$1.4 billion by 2009, creating new business opportunities for entrepreneurs and new jobs for Slovakia's workforce.

Reducing Piracy Could Boost Jobs and the Economy

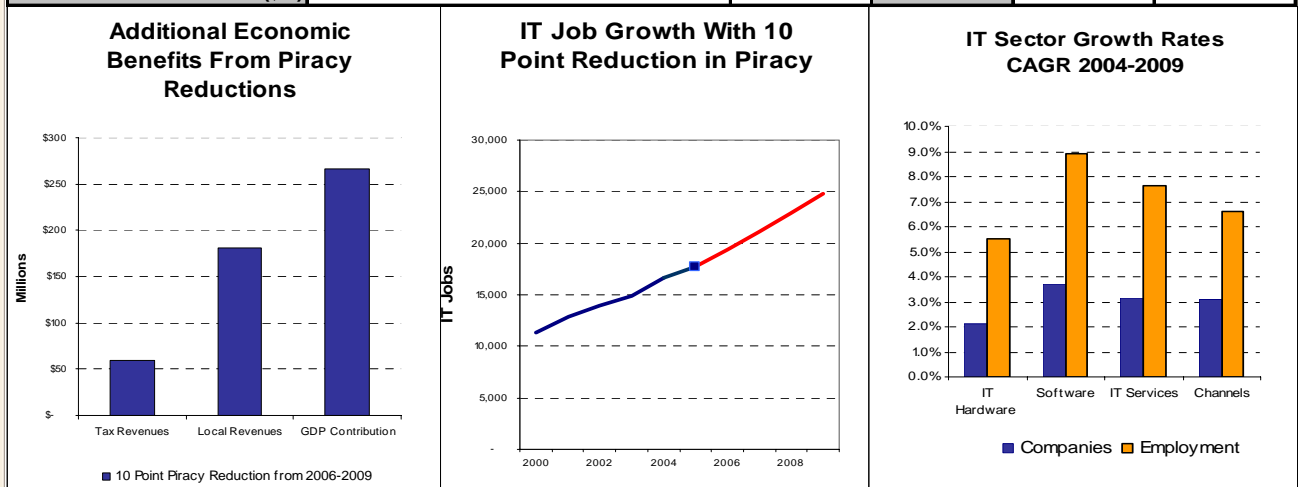
Cutting Slovakia's piracy rate from 48 percent to 38 percent could add \$267 million to its economy, increase local industry revenues by \$181 million, and pump an additional \$60 million into Slovakia's tax coffers. The 10-point reduction could also create 1,400 new high tech jobs.

Software is Fueling Economic Opportunities

Strong software demand has helped increase the country's domestic IT revenues 15 percent a year on average, adding \$128 million to the economy in software revenues alone and creating 5,400 additional IT jobs between 2000 and 2004. Slovakia's IT sector now encompasses nearly 1,700 businesses, employing more than 16,000 people, and generating \$360 million a year in taxes. Decreasing Slovakia's piracy rate by 10-points would help Slovakia's IT sector become a \$1.4 billion, 25,000 employee industry by 2009.

Slovakia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	SKK Millions	USD Millions	SKK Millions	USD Millions	SKK Millions	CAGR
IT Hardware	\$ 248	8,015	\$ 431	13,915	\$ 629	20,320	7.9%
Software	\$ 89	2,878	\$ 141	4,563	\$ 257	8,314	12.7%
IT Services	\$ 137	4,424	\$ 248	8,013	\$ 417	13,458	10.9%
Total IT Revenue	\$ 474	15,318	\$ 820	26,491	\$ 1,303	42,092	9.7%

Slovakia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 620	\$ 1,079	\$ 1,743	\$ 1,861	\$267	61.5%	72.5%
Jobs	11,284	16,712	23,430	24,848	1,418	40.2%	48.7%
IT Tax Revenues (\$M)	\$ 212	\$ 362	\$ 602	\$ 628	\$60	66.3%	73.6%



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SLOVENIA

Lower Piracy and Continued Software Growth Could Transform Slovenia's IT Sector Into an \$850 Million Industry

As Slovenia's IT industry grew to \$560 million a year, the country transformed growth in its IT sector into tangible economic benefits including 2,300 new jobs since 2000. If Slovenia further reduced its 51 percent piracy rate by 10 points, its IT sector could grow to \$850 million by 2009.

Battling Piracy Could Fuel the Economy

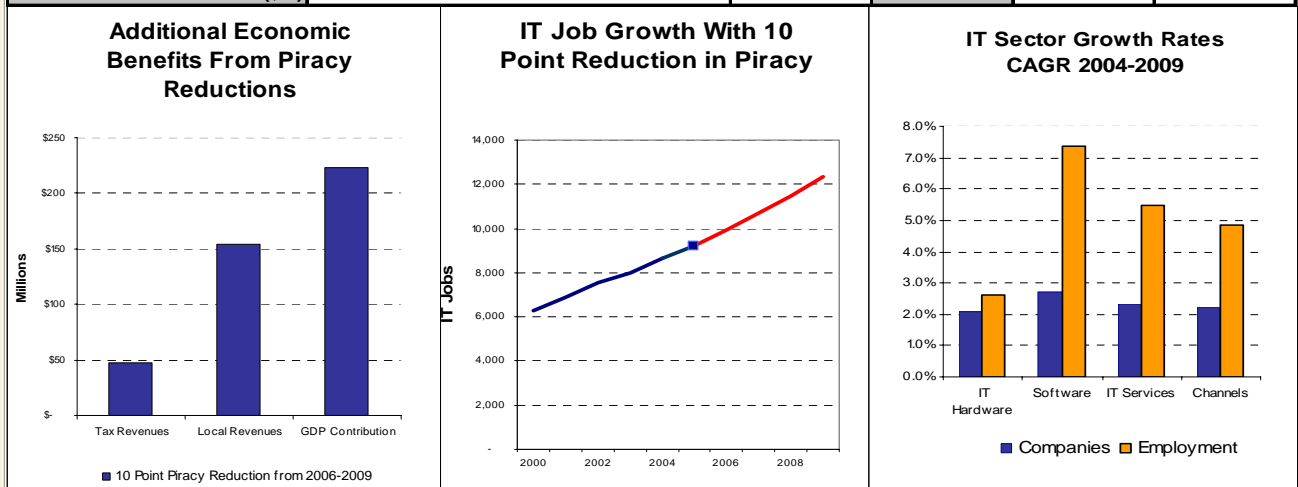
A 10-point drop in Slovenia's piracy rate could create 1,100 new IT jobs and pump \$224 million into the economy. It could also increase local industry revenues by \$154 million and generate \$74 million in additional tax revenues.

Software Will Lead Growth and Add Jobs

High software piracy and a lower than average software sector growth have combined to stall Slovenia's ability to fully harness its IT sector's potential. In coming years, the software sector will lead the IT sector in growth with an impressive 10.2 percent per year average growth rate — growing nearly twice as fast as its hardware sector between 2005 and 2009. Reducing its software piracy rate further could help Slovenia's IT sector generate nearly 3,700 more jobs and \$400 million additional GDP per year to an already growing IT economy by 2009.

Slovenia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	SIT Millions	USD Millions	SIT Millions	USD Millions	SIT Millions	CAGR
IT Hardware	\$ 210	41,039	\$ 296	57,785	\$ 382	74,669	5.3%
Software	\$ 66	12,844	\$ 102	20,006	\$ 166	32,525	10.2%
IT Services	\$ 101	19,717	\$ 163	31,963	\$ 236	46,232	7.7%
Total IT Revenue	\$ 376	73,600	\$ 561	109,754	\$ 785	153,426	6.9%

Slovenia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 484	\$ 737	\$ 1,043	\$ 1,138	\$224	41.6%	54.4%
Jobs	6,302	8,657	11,217	12,336	1,119	29.6%	42.5%
IT Tax Revenues (\$M)	\$ 184	\$ 284	\$ 461	\$ 466	\$47	62.1%	64.1%



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UKRAINE

Ukraine's Billion Dollar IT Sector Could More Than Double — Creating New Jobs and Opportunities

Although hindered by the second highest software piracy rate in the entire global survey, reducing Ukraine's software piracy from 91 percent to 81 percent could help Ukraine's IT sector grow from \$1 billion today to \$2.7 billion by 2009. This growth could create unprecedented new opportunities for entrepreneurs and thousand of new jobs for its workforce.

Less Piracy Could Mean More Growth

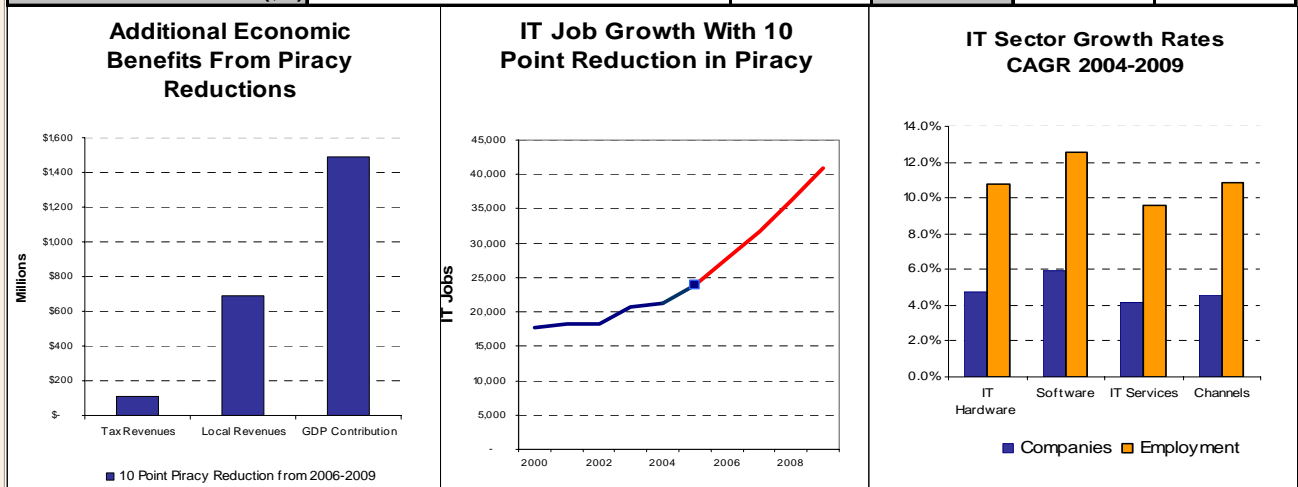
A 10-point drop in Ukraine's piracy rate could create more than 5,000 jobs and pump nearly \$1.5 billion into the economy. It could also increase local industry revenues by more than \$680 million and generate an extra \$108 million in tax revenues for much needed projects.

Potential For Huge Economic Gains Ahead

Stunted by a traditionally high piracy rate, Ukraine has yet to achieve the full promise of its IT sector. Despite this, Ukraine's IT sector added \$62 million in new software revenues alone to the economy, and created more than three thousand new IT jobs between 2000 and 2004. By further reducing its software piracy rate, Ukraine could unlock a new era of IT-fueled economic growth — growing faster than all but a handful of countries and more than doubling the size of its IT sector by 2009.

Ukraine's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	UAH Millions	USD Millions	UAH Millions	USD Millions	UAH Millions	CAGR
IT Hardware	\$ 424	2,316	\$ 819	4,477	\$ 1,645	8,996	15.0%
Software	\$ 55	302	\$ 77	422	\$ 172	941	17.4%
IT Services	\$ 80	438	\$ 132	720	\$ 247	1,350	13.4%
Total IT Revenue	\$ 559	3,057	\$ 1,028	5,619	\$ 2,064	11,287	15.0%

Ukraine's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 645	\$ 1,165	\$ 2,329	\$ 2,959	\$1,491	99.9%	153.9%
Jobs	17,660	21,341	35,704	40,900	5,196	67.3%	91.6%
IT Tax Revenues (\$M)	\$ 50	\$ 94	\$ 201	\$ 247	\$108	112.9%	161.7%



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EGYPT

Egypt's Thriving IT Sector Could Nearly Double — Creating New Economic Opportunities, Jobs, and Tax Revenues

Growing demand for software has already helped catapult Egypt's IT sector into a dynamic \$560 million industry. Reducing Egypt's 65 percent piracy rate by another 10 percentage points would help the industry grow 91 percent to \$1.1 billion by 2009.

Less Piracy Means More Growth

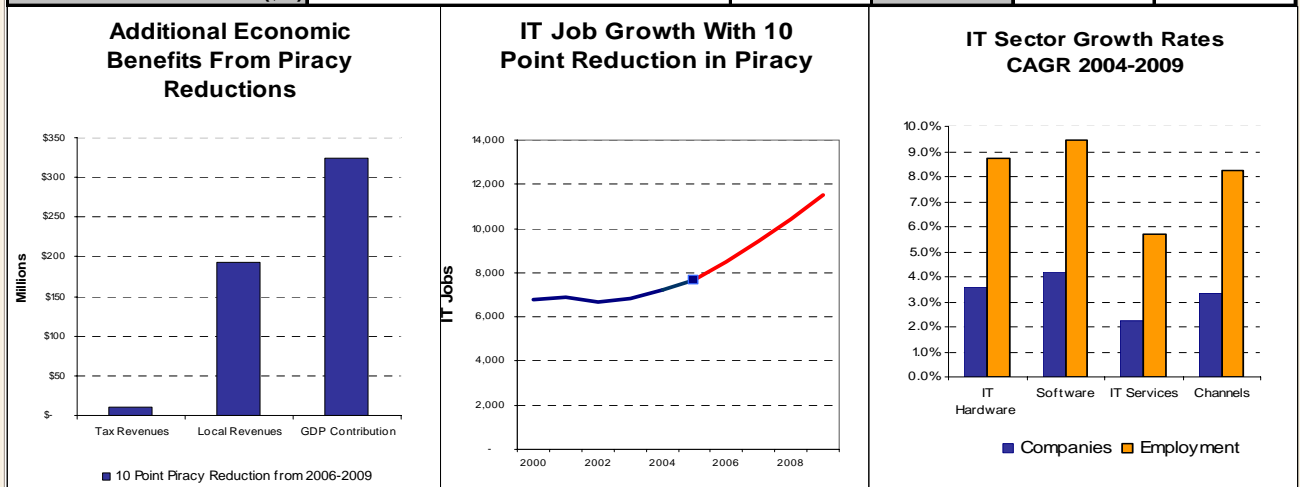
Poised to see enormous new benefits, cutting Egypt's piracy rate from 65 percent to 55 percent could add nearly \$325 million to its economy, increase local industry revenues by more than \$190 million, generate an additional \$11 million in tax revenues, and create 850 new jobs.

Cutting Piracy Is a Proven Economic Stimulus

Between 2000 and 2004, demand for software in Egypt grew 48 percent. Egypt now boasts the largest software sector as a fraction of its IT sector in the region. Going forward, software will continue to lead IT sector growth and drive economic benefits. By further reducing its software piracy rate by another 10-points, Egypt's IT sector could grow 91 percent, generate 4,300 more IT jobs, create \$34 million in extra tax revenues, and drive \$610 million more contribution to GDP per year to an already growing IT economy by 2009.

Egypt's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	EGP Millions	USD Millions	EGP Millions	USD Millions	EGP Millions	CAGR
IT Hardware	\$ 338	2,108	\$ 357	2,231	\$ 628	3,921	11.9%
Software	\$ 78	486	\$ 115	719	\$ 214	1,338	13.2%
IT Services	\$ 93	583	\$ 89	557	\$ 131	816	8.0%
Total IT Revenue	\$ 509	3,177	\$ 562	3,507	\$ 973	6,075	11.6%

Egypt's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 612	\$ 671	\$ 1,144	\$ 1,280	\$324	70.6%	90.8%
Jobs	6,796	7,246	10,689	11,547	858	47.5%	59.4%
IT Tax Revenues (\$M)	\$ 18	\$ 34	\$ 57	\$ 61	\$11	67.4%	81.0%



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ISRAEL

With A Fast-Growing Software Industry, Israel's IT Sector Has the Potential to Become a \$4.4 Billion Powerhouse

Low software piracy has already helped Israel translate innovation in its IT sector into tangible economic benefits. If Israel further reduced its 33 percent piracy rate by 10 points, its IT sector could grow from \$3.4 billion to \$4.4 billion by 2009.

Piracy Drop Could Create Jobs and Expand the Tax Base

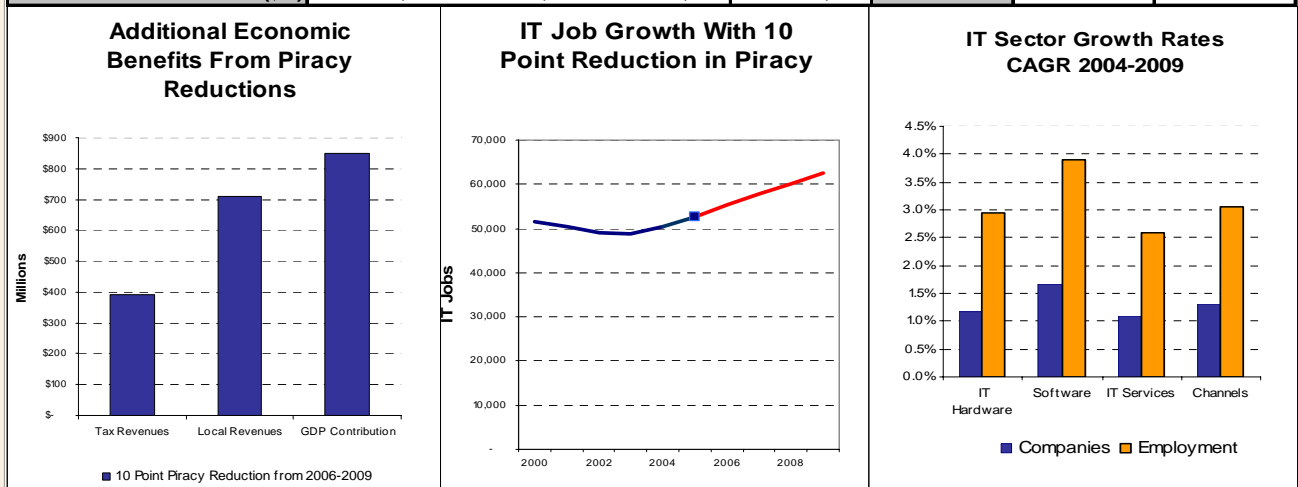
Decreasing Israel's piracy rate to 23 percent would add \$850 million to its economy, create 3,800 more IT jobs, and increase local industry revenues by more than \$700 million. That, in turn, would generate nearly \$400 million in additional tax revenue to help pay for public benefits and services.

Software Will Lead Growth and Add Jobs

With the lowest piracy rate in the Middle East/Africa region, Israel now benefits from one of the largest software sectors as a portion of its IT sector. Israel's IT sector now consists of 3,400 businesses, employing more than 50,000 people, and generating almost \$3.3 billion a year in taxes. By further reducing its software piracy rate, Israel's IT sector could generate 12,000 more IT jobs, create \$1.1 billion in extra tax revenues, and add \$1.4 billion to a software driven IT economy by 2009.

Israel's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	ILS Millions	USD Millions	ILS Millions	USD Millions	ILS Millions	CAGR
IT Hardware	\$ 1,626	7,304	\$ 1,536	6,900	\$ 1,880	8,443	4.1%
Software	\$ 580	2,606	\$ 603	2,708	\$ 786	3,529	5.4%
IT Services	\$ 1,266	5,687	\$ 1,251	5,621	\$ 1,494	6,709	3.6%
Total IT Revenue	\$ 3,473	15,597	\$ 3,391	15,229	\$ 4,159	18,681	4.2%

Israel's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 4,902	\$ 4,819	\$ 5,897	\$ 6,243	\$850	22.4%	29.6%
Jobs	51,588	50,416	58,638	62,508	3,870	16.3%	24.0%
IT Tax Revenues (\$M)	\$ 3,587	\$ 3,345	\$ 4,104	\$ 4,264	\$393	22.7%	27.5%



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KUWAIT

Kuwait's Growing IT Sector Poised to Nearly Double in Size — Creating New Economic Opportunity, Jobs, and Expansion

Kuwait's emerging IT sector has now grown into a \$430 million industry. Reducing Kuwait's 68 percent piracy rate by 10 percentage points would help the industry double in size to become a \$830 million engine for economic prosperity by 2009.

Reducing Piracy Could Grow High Tech Jobs

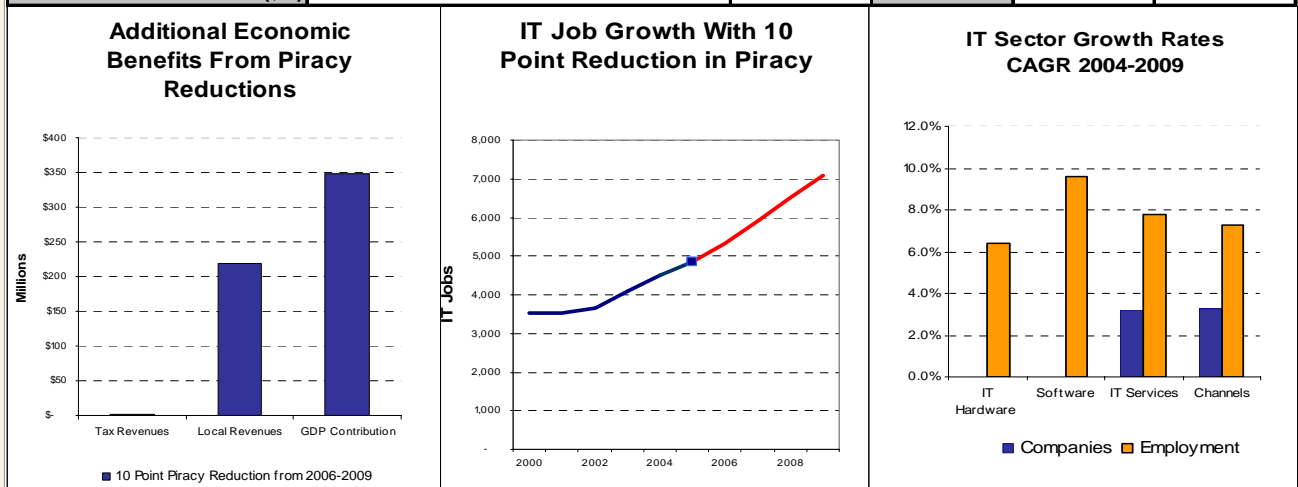
Decreasing Kuwait's piracy rate from 68 percent to 58 percent could deliver one of the largest relative benefits in the region. Such a cut could add nearly \$350 million to its economy, increase local industry revenues by \$219 million, and pump an additional \$1 million into Kuwait's tax base. The 10-point reduction could also create more than 600 new high tech jobs — more jobs than are currently supported by Kuwait's hardware, software or services sectors.

Piracy Cuts and Software Growth Could Unleash Economic Potential

Between 2000 and 2004, demand for software in Kuwait grew 85 percent. Strong software growth helped drive Kuwait's IT sector benefits — adding \$450 million in new IT revenues to the economy, and creating nearly 1,000 new IT jobs between 2000 and 2004. By further reducing its software piracy rate, Kuwait could double the size of its IT sector, generate 2,600 more IT jobs, create \$5 million a year in extra tax revenues, and add \$525 million a year to an already growing IT-enabled economy by 2009.

Kuwait's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	KWD Millions	USD Millions	KWD Millions	USD Millions	KWD Millions	CAGR
IT Hardware	\$ 119	35	\$ 229	68	\$ 354	105	9.1%
Software	\$ 44	13	\$ 82	24	\$ 156	46	13.6%
IT Services	\$ 76	23	\$ 120	36	\$ 203	60	11.1%
Total IT Revenue	\$ 239	71	\$ 431	128	\$ 713	211	10.6%

Kuwait's IT Economic Benefits							
	2000	2004	2009	2009 w/ Piracy Reduction	Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	Contribution to GDP* (\$M)	\$ 321	\$ 564	\$ 942	\$ 1,089	\$349	67.1%
Jobs	3,524	4,511	6,464	7,073	609	43.3%	56.8%
IT Tax Revenues (\$M)	\$ 9	\$ 9	\$ 13	\$ 13	\$1	39.9%	46.4%



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SAUDI ARABIA

Saudi Arabia's IT Sector Could Generate 16,000 New Jobs, Add Millions More in Tax Revenues

Having created 7,000 IT jobs in the last four years, Saudi Arabia's IT sector could add another 16,000 jobs with the help of an economic stimulus resulting from a 10-point drop in its 52 percent software piracy rate. Cutting piracy would also help Saudi Arabia's emerging \$2 billion IT sector grow to \$3.7 billion by 2009.

Less Piracy Could Generate More Growth

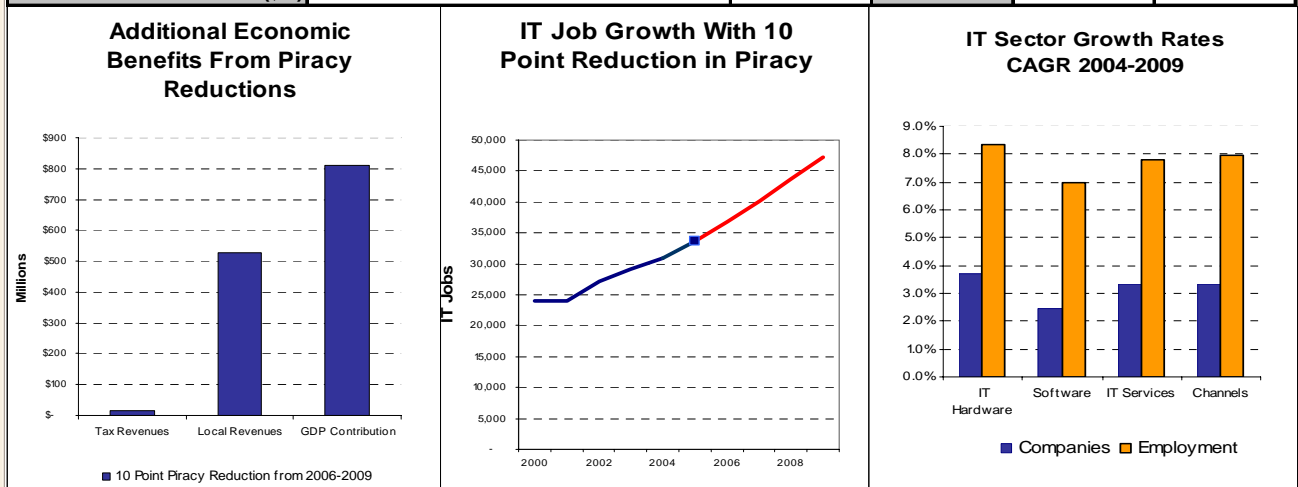
Saudi Arabia could add \$800 million to its economy, create nearly 2,000 high-wage technology jobs, increase local industry revenues by more than \$500 million, and generate an additional \$17 million in tax revenues — all by decreasing the country's piracy rate from 52 percent to 42 percent.

Piracy Cuts and Software Growth Are Proven Job Creators

Between 2000 and 2004, Saudi Arabia saw demand for software nearly double. This strong software growth, the third highest in the global survey, helped boost IT industry benefits — adding \$500 million in new software revenues alone to the economy between 2000 and 2004. The next 4 years could be even better with a 10-point piracy reduction. With the help of a cut in piracy from 52 percent to 42 percent, Saudi Arabia's IT sector could grow 83 percent and add \$2.3 billion to an already growing IT economy by 2009.

Saudi Arabia's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	SAR Millions	USD Millions	SAR Millions	USD Millions	SAR Millions	CAGR
IT Hardware	\$ 654	2,455	\$ 971	3,642	\$ 1,705	6,395	11.9%
Software	\$ 206	773	\$ 406	1,521	\$ 653	2,449	10.0%
IT Services	\$ 576	2,162	\$ 661	2,480	\$ 1,120	4,201	11.1%
Total IT Revenue	\$ 1,437	5,390	\$ 2,038	7,643	\$ 3,478	13,045	11.3%

Saudi Arabia's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 2,018	\$ 2,754	\$ 4,682	\$ 5,023	\$811	70.0%	82.4%
Jobs	23,962	31,003	45,342	47,315	1,973	46.3%	52.6%
IT Tax Revenues (\$M)	\$ 195	\$ 274	\$ 395	\$ 402	\$17	44.4%	46.9%



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SOUTH AFRICA

South Africa's IT Sector Is a Proven Economic Engine That Could Grow To \$10 Billion

Strong growth in the software and service industries has helped South Africa's IT sector grow to \$6.6 billion. Reducing its 37 percent piracy rate to 27 percent by 2009 could help the industry grow to \$10 billion and add another 15,000 high tech jobs.

South Africa Could See the Biggest Benefit In The Region

A 10-point drop in South Africa's piracy rate could directly create 2,400 jobs and pump \$1.7 billion into the economy. It could also increase local industry revenues by more than \$1.2 billion and generate \$131 million in additional tax revenues.

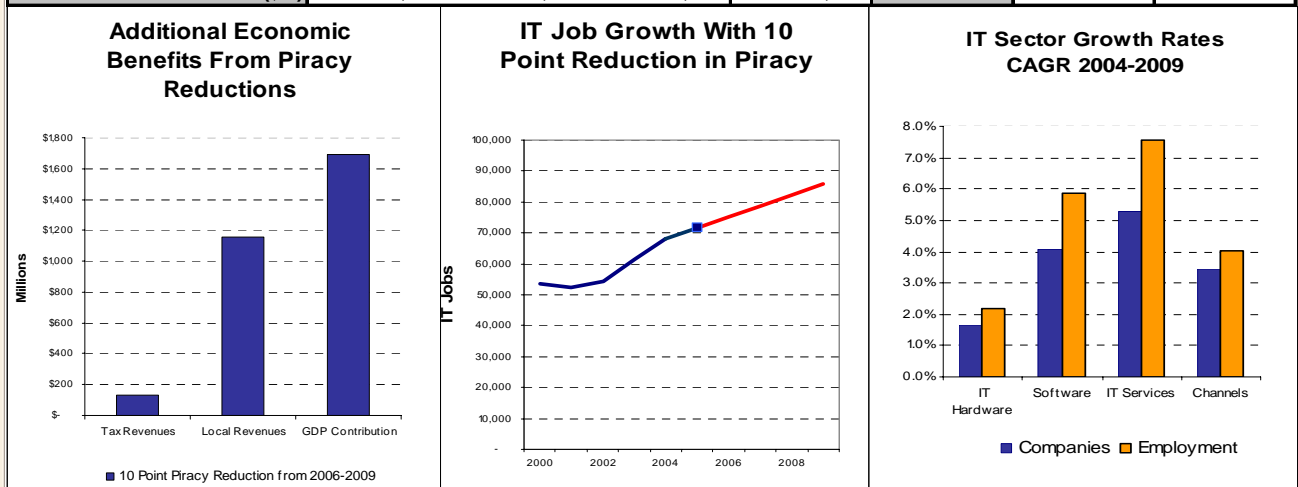
Piracy Reductions and Strong IT Growth Are An Unbeatable Combination

Between 2000 and 2004, demand for software in South Africa grew 42 percent. Strong software demand helped drive IT sector benefits — adding \$640 million in new software revenues alone to the economy, and creating more than 14,000 new IT jobs between 2000 and 2004.

Now South Africa benefits from the largest IT sector in the Middle East/Africa region. A 10-point software piracy cut could help it grow another 50 percent by 2009.

South Africa's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	ZAR Millions	USD Millions	ZAR Millions	USD Millions	ZAR Millions	CAGR
IT Hardware	\$ 2,266	14,636	\$ 2,720	17,566	\$ 3,160	20,413	3.0%
Software	\$ 850	5,492	\$ 1,203	7,773	\$ 1,786	11,535	8.2%
IT Services	\$ 1,849	11,944	\$ 2,682	17,323	\$ 4,424	28,575	10.5%
Total IT Revenue	\$ 4,966	32,072	\$ 6,605	42,662	\$ 9,371	60,523	7.2%

South Africa's IT Economic Benefits				Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction		
Contribution to GDP* (\$M)	\$ 6,842	\$ 9,320	\$ 13,799	\$ 14,515	\$1,693	55.7%
Jobs	53,698	68,250	83,514	85,879	2,365	25.8%
IT Tax Revenues (\$M)	\$ 1,533	\$ 2,191	\$ 3,597	\$ 3,653	\$131	66.7%



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TURKEY

Turkey's Emerging IT Sector Could See 120% Growth — Faster Than All Others In the Region

Turkey's IT sector stands to grow from \$2.4 billion today to \$5.3 billion in just 4 years if the country can cut its 66 percent piracy rate by 10 points. Such a reduction would help Turkey unleash the creative potential of its entrepreneurs, who in turn could employ 36,000 more of Turkey's workers in high-wage jobs.

Cutting Piracy Could Speed Economic Growth

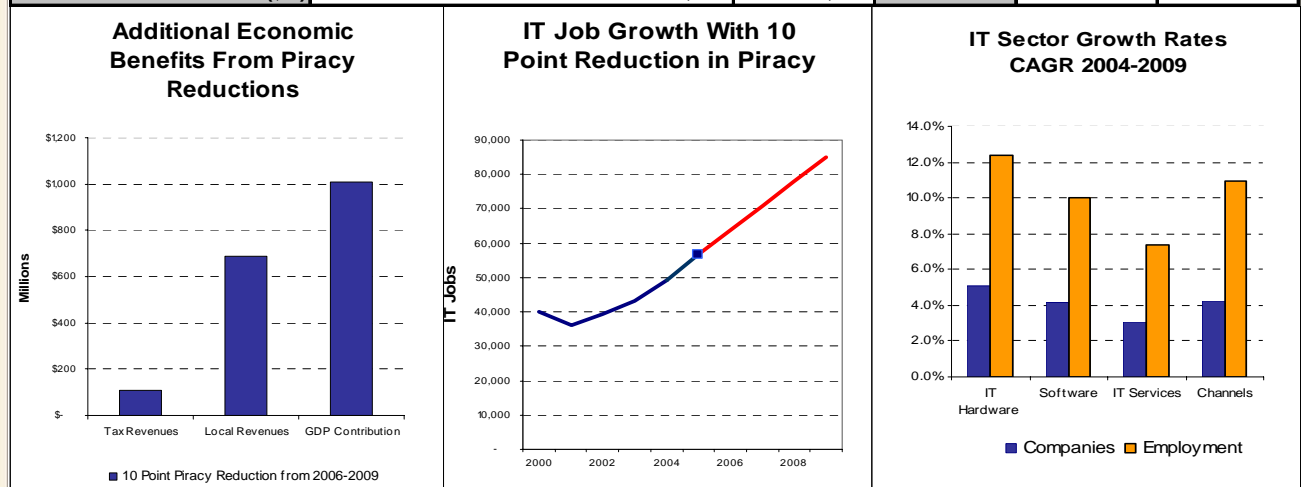
Projected to see one of the most significant regional gains, cutting Turkey's piracy rate from 66 percent to 56 percent could directly add \$1 billion to its economy, increase local industry revenues by more than \$650 million, and pump an additional \$100 million into Turkey's tax coffers. The 10-point reduction could also create nearly 3,000 new IT jobs.

More to Gain Than Most From Piracy Reductions

Turkey's emerging IT sector already enjoys the benefits derived from its 6,600 businesses, employing nearly 50,000 people, and generating more than \$650 million a year in taxes. However, by reducing its software piracy rate, Turkey could more than double the size of its IT sector by 2009, boosting the size of its IT sector by \$2.9 billion, generating 36,000 more jobs, and adding nearly \$600 million a year in extra tax revenues.

Turkey's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	TRY Billions	USD Millions	TRY Billions	USD Millions	TRY Billions	CAGR
IT Hardware	\$ 1,263	1,829,311	\$ 1,610	2,332,029	\$ 3,570	5,172,590	17.3%
Software	\$ 403	583,249	\$ 316	458,431	\$ 609	882,234	14.0%
IT Services	\$ 327	473,945	\$ 501	726,507	\$ 818	1,185,315	10.3%
Total IT Revenue	\$ 1,992	2,886,506	\$ 2,427	3,516,968	\$ 4,997	7,240,140	15.5%

Turkey's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 2,448	\$ 3,005	\$ 5,977	\$ 6,400	\$1,009	98.9%	113.0%
Jobs	40,181	49,165	82,079	84,982	2,903	66.9%	72.9%
IT Tax Revenues (\$M)	\$ 504	\$ 664	\$ 1,251	\$ 1,298	\$111	88.6%	95.5%



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UNITED ARAB EMIRATES

The United Arab Emirates' IT Sector Could Become a \$2.3 Billion Generator for Economic Prosperity

With the help of an already low software piracy rate, the United Arab Emirates' IT sector has developed into a thriving \$1.3 billion industry. With the help of a 10-point reduction in its 34 percent software piracy rate, the IT sector could grow to nearly \$2.3 billion by 2009, creating new business opportunities for entrepreneurs and new jobs opportunities for its workers.

Cutting Piracy Could Create Jobs and Add Revenues

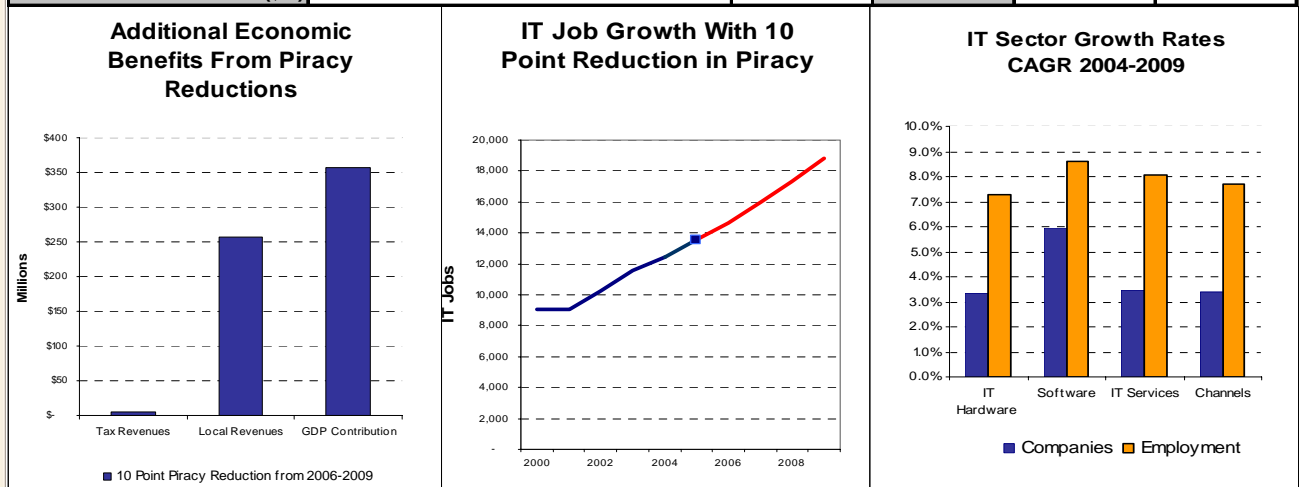
Decreasing the United Arab Emirates' piracy rate to 24 percent would add \$350 million to its economy, create more than 650 new jobs, and increase local industry revenues by more than \$250 million. These new revenues and jobs would, in turn, create an additional \$5 million in tax revenue to help the government pay for public benefits and services.

Lowering Piracy Is a Proven Strategy for Raising Economic Opportunity

Between 2000 and 2004, demand for software in the United Arab Emirates grew 33 percent. This strong software growth helped drive IT sector benefits — adding over \$75 million in new software revenues alone to the economy, and creating more than 3,400 new IT jobs between 2000 and 2004. The United Arab Emirates is now poised to create even greater economic opportunities by further reducing its software piracy rate. Further piracy reductions would allow the IT sector to grow 75 percent instead of the projected 68 percent between 2004 and 2009.

United Arab Emirates's IT Sector							Growth
Revenue **	2000		2004		2009		2004-2009
	USD Millions	AED Millions	USD Millions	AED Millions	USD Millions	AED Millions	CAGR
IT Hardware	\$ 559	2,052	\$ 829	3,046	\$ 1,360	4,996	10.4%
Software	\$ 150	552	\$ 200	734	\$ 357	1,312	12.3%
IT Services	\$ 279	1,026	\$ 306	1,124	\$ 526	1,934	11.5%
Total IT Revenue	\$ 988	3,630	\$ 1,335	4,904	\$ 2,244	8,242	10.9%

United Arab Emirates's IT Economic Benefits					Total Piracy Reduction Benefit	2004-2009 Growth	04-09 Growth w/ Piracy Reduction
	2000	2004	2009	2009 w/ Piracy Reduction			
Contribution to GDP* (\$M)	\$ 1,285	\$ 1,670	\$ 2,824	\$ 2,978	\$357	69.1%	78.3%
Jobs	9,042	12,467	18,148	18,815	667	45.6%	50.9%
IT Tax Revenues (\$M)	\$ 92	\$ 112	\$ 156	\$ 158	\$5	39.4%	41.4%



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