

Connectivity Scorecard 2011

Poland



Poland
4.26

| | Score | Weight |
|--|--------------|--------|
| Consumer Infrastructure | 0.45 (0.95)* | 0.13 |
| Consumer Usage and Skills | 0.38 (0.79)* | 0.13 |
| Business Infrastructure | 0.54 (0.86)* | 0.22 |
| Business Usage and Skills | 0.37 (0.83)* | 0.43 |
| Public sector Infrastructure | 0.13 (0.79)* | 0.03 |
| Public sector Usage and Skills | 0.23 (0.79)* | 0.05 |

*The score of the leading performer for this component

Table 1: Component Scores & Weights 2011

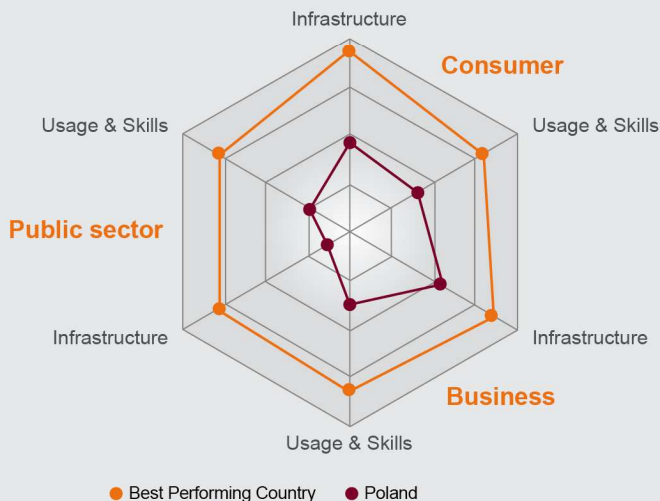


Fig 1: Component Scores 2011

Overview

Poland scores 4.26 and retains its ranking of 24th among the Innovation-driven¹ economies on the Connectivity Scorecard 2011 index.

The country continues to perform poorly and has not improved its position from last year. Poland's performance is poor across all six components, but is particularly so in public sector infrastructure and usage where it is the worst performer on the majority of metrics. Also, the country lags well behind the rest of Europe in the consumer and business sectors infrastructure provision, adoption and usage across broadband and mobile platforms.

Strengths

Poland's strengths are few in comparison to its weaknesses. In the consumer sector, the country's mobile text usage is higher than many advanced European and Asia-Pacific states. However, this may be the result of some country-specific cultural preferences. Also, the relative price of mobile and fixed voice calls in Poland is substantially lower than the average of all the innovation-driven economies. The second metric on which Poland performs reasonably well is the business acceptance of mobile data services, where it scores better than several advanced Western European and Asia-Pacific countries. However, Poland's results in this metric can also be attributed to the existing discrepancy in the exact classification of an "enterprise line." Also, since Poland has a weak record in other areas of data adoption and usage, it quite possible that the same pattern of result is reflected in other areas as well.

¹ As defined by The World Economic Forum www.weforum.org

Weaknesses

Among Poland's various weaknesses, consumer infrastructure is the most worrisome area. Coverage and penetration rates for both broadband and mobile phones are well below European averages. For instance, 3G coverage in Poland was just 19% in 2008 compared to 90%-100% in most of Western Europe. Also, fixed broadband penetration is at around half the level observed in leading European countries. Consumer usage and skills represent another area of weakness for Poland. In particular, the country lags well behind the Western Europe in the adoption of internet in general as well as internet-based services like online banking and shopping.

From a business perspective, there are a number of areas in terms of both infrastructure and usage in which Poland has a long way to go to catch up with Western Europe. The penetration rates of secure internet servers and personal computers are low and business spending on IT and corporate data services is amongst the lowest of all the innovation-driven economies. Furthermore, business uptake of broadband is considerably below the level observed in other transition economies and Southern European countries.

Poland's weakest performances however come from the government sector. The country consistently ranks at the bottom of the table on measures of government spending on IT hardware, software and services, usage of e-government services and the UN's indices of e-participation and e-government service.

Conclusions

Poland still lags well behind Western Europe and exhibits weaknesses in all six components of the Connectivity Scorecard. The government and public sector in Poland in particular is very weak in terms of its deployment and usage of ICT. In the consumer and business sectors, much still needs to be done to boost the country's mobile and broadband infrastructure to the levels observed elsewhere in the EU and then to encourage acceptance of commercial and government services online. Thus, in order to truly harness the benefits of ICT, Poland needs to make significant improvements across all sectors and segments.

2011 vs. 2010

Poland scored 4.26 this year compared to 4.06 in 2010, whilst maintaining its rank at 24th. The small variation in scores

| Rank [2010] | Country | Connectivity Score |
|-------------|----------------|--------------------|
| 1 [1] | Sweden | 7.84 |
| 2 [2] | United States | 7.82 |
| 3 [4] | Denmark | 7.47 |
| 4 [5] | Netherlands | 7.45 |
| 5 [3] | Norway | 7.09 |
| 6 [8] | United Kingdom | 7.06 |
| 7 [7] | Australia | 6.93 |
| 8 [9] | Canada | 6.88 |
| 9 [6] | Finland | 6.78 |
| 10 [11] | Singapore | 6.40 |
| 11 [15] | Belgium | 6.31 |
| 12 [n/a] | Austria | 6.27 |
| 13 [17] | Germany | 6.27 |
| 14 [12] | Ireland | 6.08 |
| 15 [18] | France | 6.06 |
| 16 [10] | Japan | 5.89 |
| 17 [16] | New Zealand | 5.84 |
| 18 [13] | Korea | 5.80 |
| 19 [20] | Spain | 5.09 |
| 20 [19] | Czech Republic | 4.93 |
| 21 [21] | Portugal | 4.80 |
| 22 [22] | Italy | 4.79 |
| 23 [23] | Hungary | 4.50 |
| 24 [24] | Poland | 4.26 |
| 25 [25] | Greece | 4.22 |

*last year's rank in parenthesis

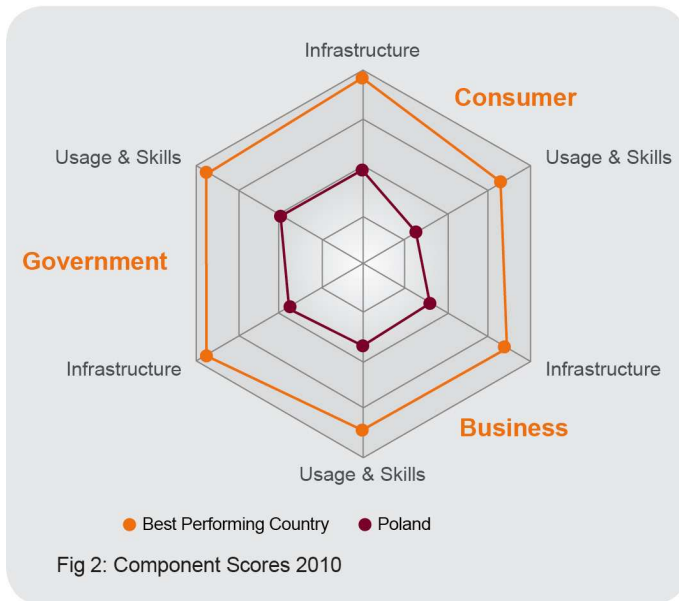
Table 2: Connectivity Scorecard 2011 Results – Innovation-driven Economies

this year² is due to the change in weights. However, even if the same weights as in 2010 were used this year, Poland's total score would have been 4.18 and its position would have slipped just one place to 25th, marginally behind Greece. More significantly, the change in scorecard component scores highlights a notable improvement in Poland's business infrastructure score and a considerable decrease in its government infrastructure and usage scores.

Poland's business infrastructure score was boosted by the inclusion of previously unavailable data on the use of new data protocols such as Ethernet and IP VPN, and the new metric measuring business usage of mobile data services.

The inclusion of additional metrics on public sector or quasi-public-sector investments in IT hardware, software and IT services had the effect of creating additional dispersion in country scores, with some country scores

² For more information download the Connectivity Scorecard 2011 Report from www.connectivityscorecard.org



on the “public” or “government” components falling substantially.

The Connectivity Scorecard is based on comparative scores between countries, and, therefore, each country's performance is measured in relation to the best performing nation in each component at a given point of time. As with other indices of relative rankings, it is difficult to interpret the Scorecard in terms of absolute “improvements” or “deteriorations” and to make comparisons of scores over time.

About Connectivity Scorecard

The Connectivity Scorecard is a global ICT index which, unlike other available research, is the first of its kind to rank countries in terms of “useful connectivity”. That is, not only on the deployment of ICT infrastructure but also to measure the extent to which consumers, businesses and the public sector “make use” of connectivity technologies to enhance social and economic prosperity.

This “useful connectivity” is defined as the bundle of infrastructure, complementary skills, software and informed usage that makes ICT the key driver of productivity and economic growth.

Commissioned by Nokia Siemens Networks, the study was created by Professor Leonard Waverman, Dean, Haskayne School of Business, University of Calgary, and Fellow, London Business School. The study was conducted by the consulting firms Berkeley Research Group and Communicea.

For more information on the Connectivity Scorecard, visit www.connectivityscorecard.org

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