

UKRAINIAN IT SERVICES AND PRODUCTS EXPORT MARKET RESEARCH'2003

Summary of key findings

By request of the AVentures company
(September – November 2003)

AVENTURES

Smart Money for Growing Investments



Market-Visio

ICT Research and Advisory Services

Gartner

Distributor in Finland, Russia and
the Baltic Countries

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Introduction

Market-Visio Company conducted a research of current status and trends of Ukrainian IT-services and products industry in September-November, 2003. The research has been conducted on demand of AVentures with an assistance of American Chamber of Commerce in Ukraine and Expert Group including eSP-Consortium, Miratech, Softline, Softjour, Tessart, Ukrainian Association of Software Developers, Ukrainian Hi-Tech Initiative and Ukrainian Software Consortium.

The present report includes the key findings of the research conducted. The report consists of 34 pages. The majority of data is produced as diagrams and tables.

Goals and methods of conducting research

The main goal of the research is to provide objective and up-to-date information on volumes, structure, main players and trends of Ukrainian software development market.

The general estimations and tendencies of Ukrainian IT-services and products export industry as well as characteristics of software development companies were explored. The following sources of data were used:

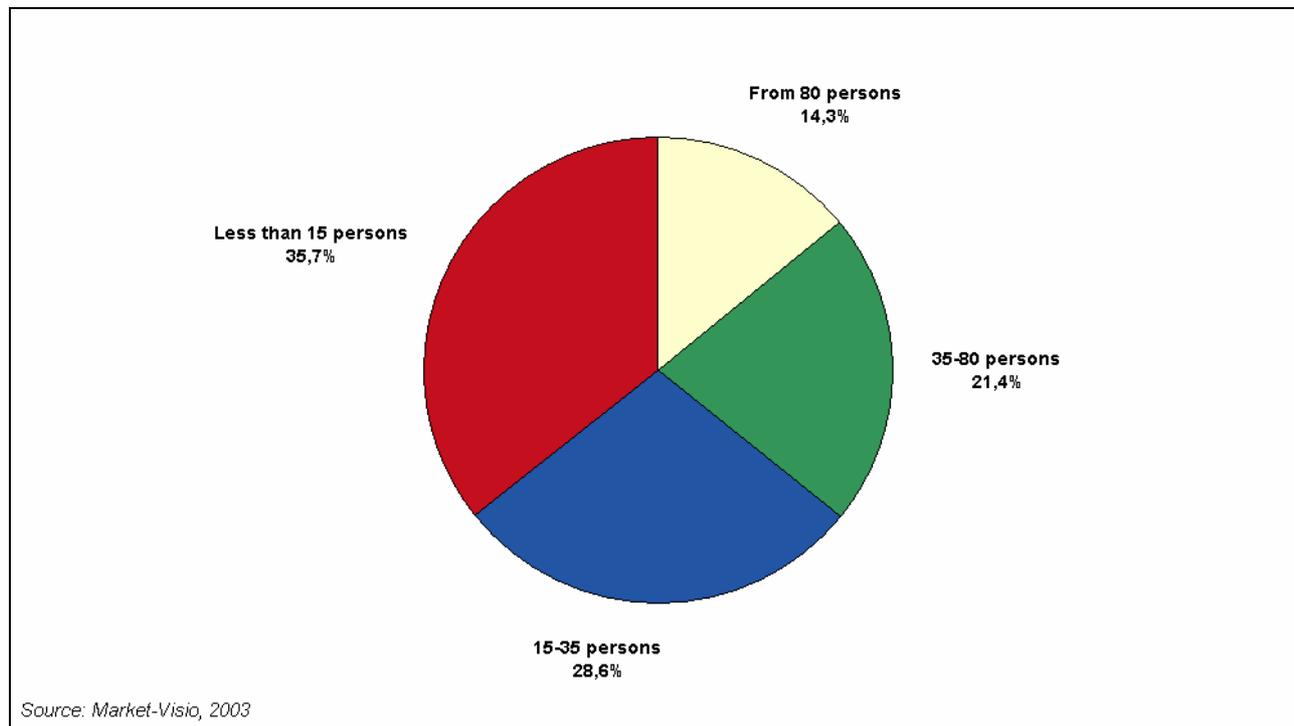
- Desk Research, including the analysis of publications in specialized editions/periodicals, web-sites and other open sources of information;
- The data of previous researches conducted by Market-Visio, Gartner and other information;
- Surveys taken by the experts of Ukrainian offshore software development market;
- Personal interviews with representatives of companies involved in IT service and product export market.
- The experts conducted seven exclusive interviews with market experts and 89 interviews (exclusive or obtained via Internet-survey) with representatives of software companies from all the regions of Ukraine.

Structure of respondents

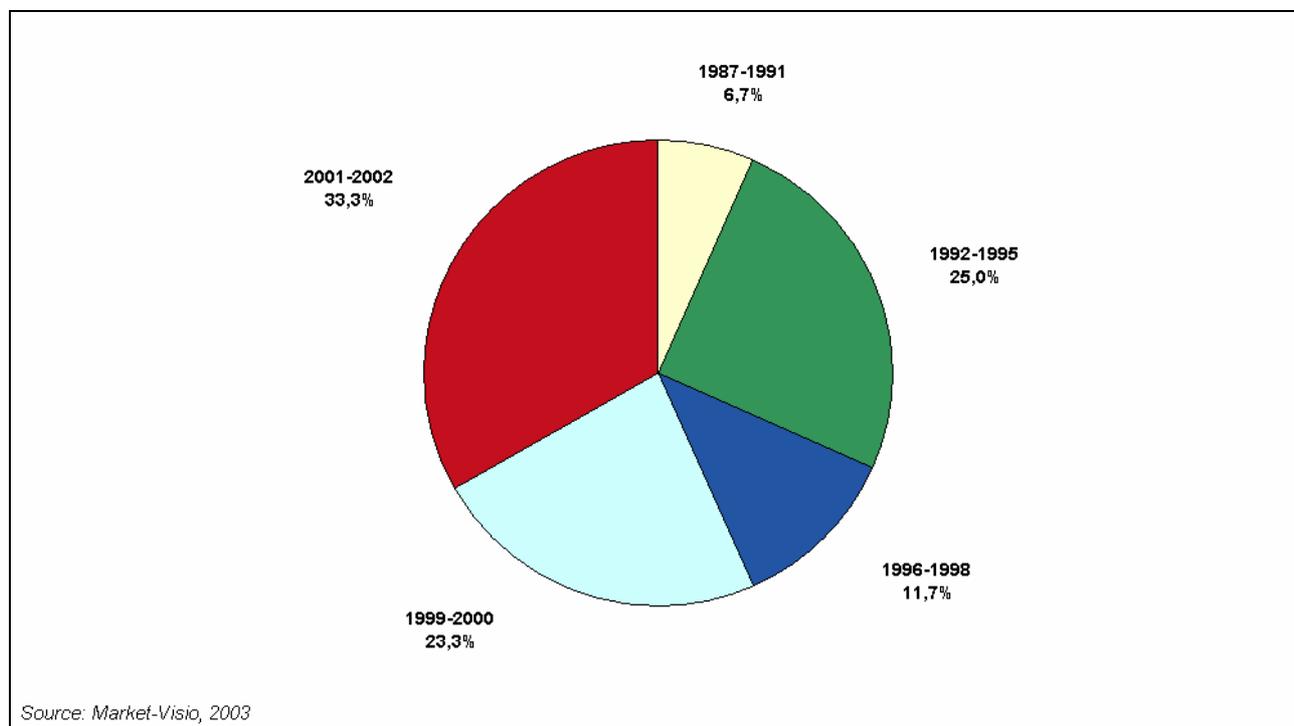
More than 60 Ukrainian IT-companies involved in IT service and products export industry have been interviewed. The geographical scope of the research covered the following cities: Kiev, Lvov, Kharkov, Odessa, Sevastopol, Dnepropetrovsk, Chernovtsy, Crimea, Vinnitsa and Kherson.

IT companies involved in open market of software development for foreign customers were the subject of the present research.

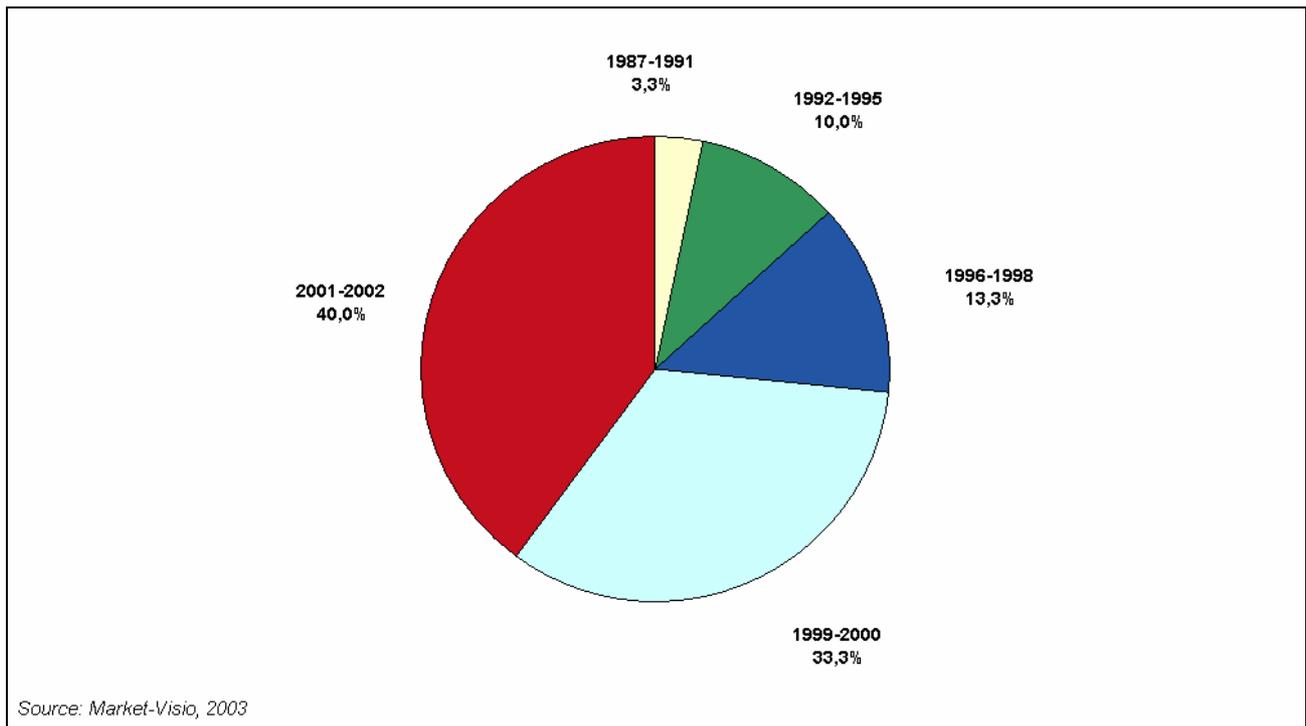
The pictures 1-4 show the structure of software development companies involved in the research according to number of their employees, structure of founders, years of foundation and engagement in export business



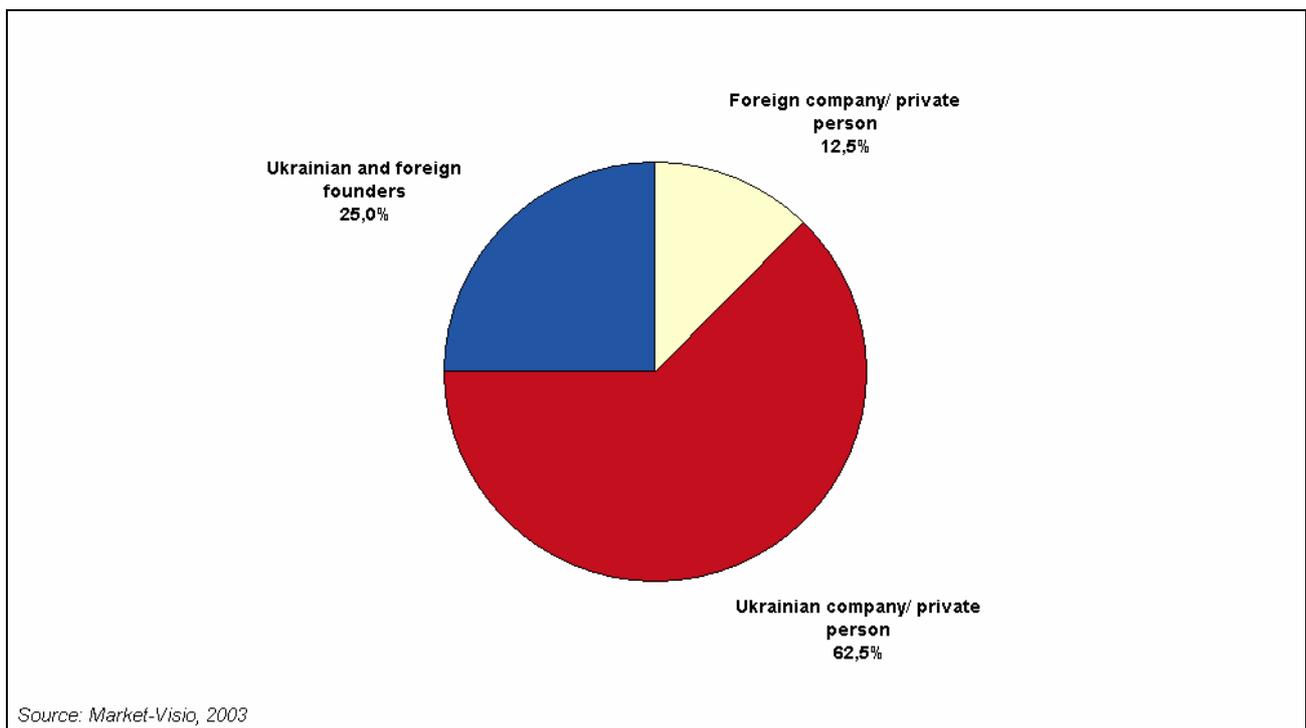
Picture 1. Respondents structure by number of employees



Picture 2. Respondents structure by years of foundation



Picture 3. Respondents structure by year since when they engaged in export business



Picture 4. Respondents structure by founders

Executive Summary

The following section summarizes the key findings of the research.

According to feedback from market experts and players, the volume of Ukrainian IT-services exports in 2003 will range from \$30M to \$100M in revenue. We estimate this amount will be \$70M. The members of the market are quite optimistic about its growth and are forecasting that Ukrainian IT-services export revenue will double over the next two years, or 40-50% annually. Increased growth rates (even exceeding the above stated) are feasible provided a) the industry's development will be supported by the Ukrainian government and b) the largest players of the market will consolidate their capacities and efforts for promotion in foreign markets.

According to the experts, export revenue comprises from 30% to 50% of the entire market for IT-services rendered (according to our calculations, 50%) and will increase to 60% by 2005.

The market is order-oriented, and the product ("off-the-shelf") model constitutes no more than 10-15%. It is forecasted that its share will grow, and in 2005 will amount up to 35%. Some experts break the market into 2 equal parts 50/50. (It is forecasted that the products will increase in their competitiveness by 2005; not it is 20%).

There are around 20-25 public (or known) IT companies in Ukraine, which are mainly located in Kiev, Lvov, Kharkov, and Dnepropetrovsk. Practically speaking, there are no development centers for large corporations in Ukraine. There are around 200 small companies and independent software developers' groups, whose market share ranges from 10% to 65% (according to our estimates amounts to 35%).

The number of total specialists working in the Ukrainian IT-services and products export market in 2003 is estimated to range between 8,000-10,000. Various public information sources provide the numbers ranging from 20,000 to 25,000.

In Ukraine, the average monthly salary of production personnel involved in IT-services and products exports software production ranges from \$300 to \$1,500, and the management salaries range from \$500 to \$2,500. It proves to be true by the data published in open sources.

The experts note that the market is still developing rapidly, and the market leaders realize the need for consolidation of efforts within Ukraine and cooperation with developers from Russia and Belarus. The IT-specialist brain drain has nearly ceased, and many of them are coming back to establish their own businesses in Ukraine.

The following large companies involved in offshore software development are operating in the Ukrainian market: Miratech, SoftLine, SoftServe, TelesensKSCL Ukraine.

Competition to Ukrainian developers comes from software companies in India, Israel, Russia, Romania, China, and Belarus.

Clients of Ukrainian IT companies include companies and organizations from the USA, Canada, Israel, Germany, France, Sweden, Denmark, Norway, Switzerland, Italy, and Spain. Ukrainian companies also receive sub-contracting orders from the Czech Republic and Poland.

The majority of the experts agree that export-oriented services must be promoted by the companies themselves through the establishment of representative offices abroad, with the assistance of Ukrainian Embassies, as well as through marketing partners. All the experts note that Ukrainian companies need to cooperate in their marketing and PR efforts with other offshore development companies and take advantage of the Internet for promotion.

All experts agree that the political stability of the state and the dynamic growth of the market are positive market factors. The Telecom sector (dedicated lines, mobile communication) is developing. Geographical location of state is also viewed as a favorable factor.

In the opinion of the experts, the negative image of the State and the lack of information about the achievements and competitive advantages of the Ukrainian IT-industry exert a negative influence on the development of the export IT industry in foreign markets. There is no State program to support the development of the export IT industry. The lack of qualified specialists, the inertia of the education system, and the drain of qualified lecturers from Ukrainian educational institutions remain issues.

1. Analysis of Ukrainian IT services and products export market

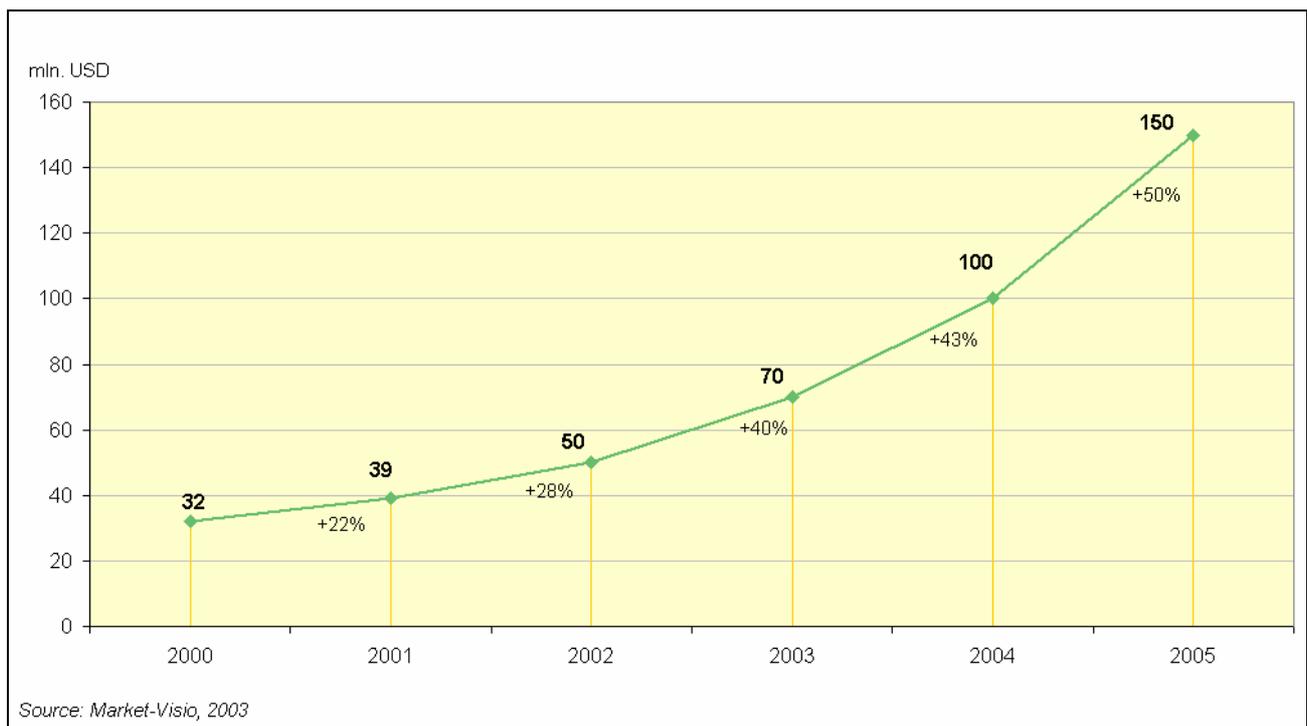
This chapter outlines the expert estimations of the Ukrainian IT-services and products export market. The Expert Group of the research included the CEO's and CIO's of the largest companies in Ukraine's IT-market, and also the participants of project who provided the estimations of market volume, its dynamics and also provided an opinion on trends of market development and its structure.

1.1. Volume of Ukrainian IT-services and products export market

According to the data provided by AVentures and Ukrainian Association of Software Developers (UASWD), the volume of the Ukrainian IT-services exports in 2000 amounted to \$32M in revenue; in 2001 its volume has increased by 22% (nearly 40M). This data proved been proven by the present research.

Some experts consider that the share of software products for export that is unaccounted for or unreported may reach up to 80%. Accordingly, their estimates of Ukrainian IT-services exports in 2003 vary from \$30M up to \$100M in revenue depending on whether this share was taken into account. We estimate the Ukrainian IT-services and products exports in 2003 to be about \$70M.

Picture 1.1 shows the dynamic growth of Ukrainian IT-services and products export market development, starting from 2000 and also forecasts market volume for the next 2 years.



Picture 1.1. Ukrainian IT service and products export market size

The players of the market are optimistic about its growth and are forecasting that Ukrainian IT-services export revenue will double over the next two years, or 40-50% annually. Increased growth rates (even exceeding the above stated) are feasible provided a) the industry's development is supported by the Ukrainian government and b) the largest players of the market will consolidate their capacities and efforts for promotion in foreign markets.

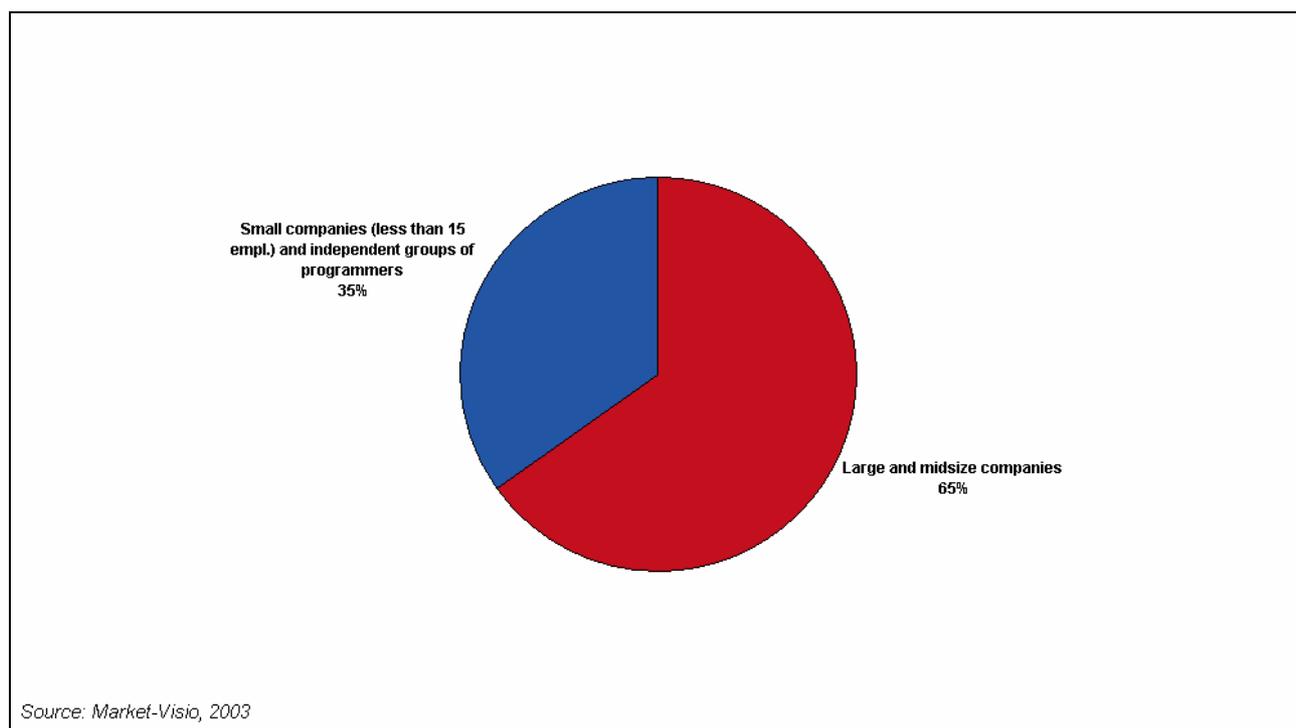
According to the experts, export revenue share amounts to 30%-50% of the entire market of IT-services. According to the data obtained during the research the export revenue share amounts to nearly 50% of the market and will probably increase to 60% by 2005.

1.2. Structure of Ukrainian providers of IT services and products for export

Within the framework of the research the following structure of Ukrainian IT services and products export market was used:

- Midsize and large IT companies;
- Software development centers of international vendors in Ukraine;
- Small companies (less than 15 person), independent software developers' groups and private developers.

The picture 1.2 shows the share of every group in Ukrainian IT-services and products export market. The estimates were provided by the participants of research.



Picture 1.2. Market shares of different IT service and products exporters groups

According to the participants' opinion, the main share of the Ukrainian IT-services and products export market (65%) is accounted for by medium and large companies. About 35% of the market is accounted for by the small companies and independent software developers' groups.

The majority of experts and market participants agree that the software development centers of international vendors are not represented in Ukraine. However, in the opinion of some members of the market, with the present positive dynamics of the Ukrainian IT-services and products export market, development centers for large corporations are likely to be established in Ukraine within the next several years. Their establishment can substantially impact the volume of Ukrainian IT-services and products exports and market structure as well.

According to offshore programming market research conducted in Russia, the development centers for large corporations (their number does not exceed 10) account for up to a quarter of entire Russian offshore software development market.

1.3. Business models and status of Department on export-oriented IT-development

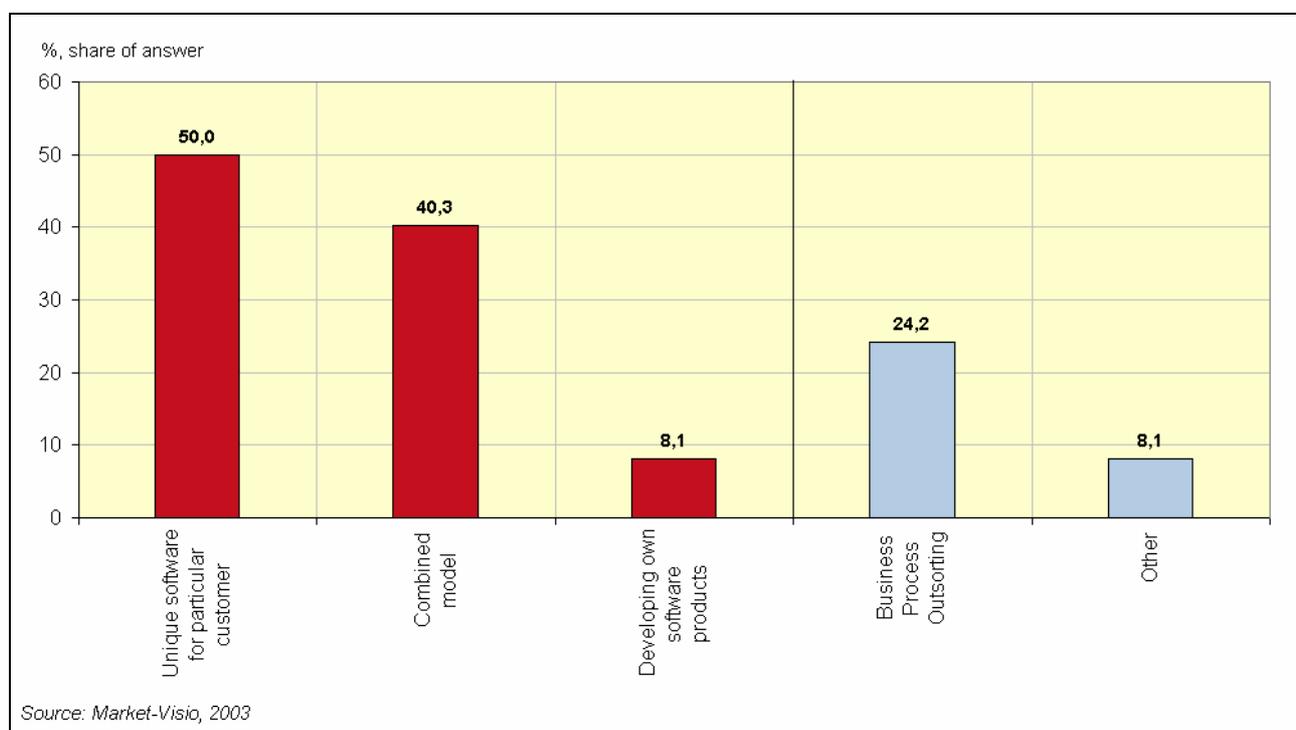
Market-Visio defines two basic business models when conducting the analysis of business models by IT-services and products' exporters:

1. Order model. Ukrainian company is involved in software development for foreign companies. All the intellectual property rights (the result of contract realization) belong to customer (foreign company). The majority of Indian companies use this model in their activity.
2. Product ("off-the-shelf") model. Ukrainian company is involved in the licensing of technologies and/or software products as a complete package, or as a part of another (separate) software package. Products and services of similar companies are mainly demanded either by software developers or licensors (licensor-companies). The product model prevails in Israel and Scandinavian states.

It is noteworthy that many companies apply combined model. Many companies develop software for foreign companies and simultaneously work on their own software products.

BPO (Business Process Outsourcing) model was also considered within the research of Ukrainian IT services and products export market. Within the framework of the present research we regarded BPO as the services of Ukrainian companies on routine operations (filling out application forms, etc.) for foreign customers. These services are not directly connected with software development, though they are mainly offered to companies operating on the IT services and products export market.

The picture 1.3 shows the structure of respondents according to business-model.



Picture 1.3. Ukrainian IT service and products exporters' business models

The basic business models used by the Ukrainian exporters of IT services and products are marked in red. Blue color indicates the share of companies that additionally offer BPO and other services.

Half of the participants offer software development services on demand only. Another 40% of respondents are involved in the software development on demand and distribution of "off-the-shelf" software as well.

The product model is used by just 8% of the Ukrainian IT services and products' exporters only.

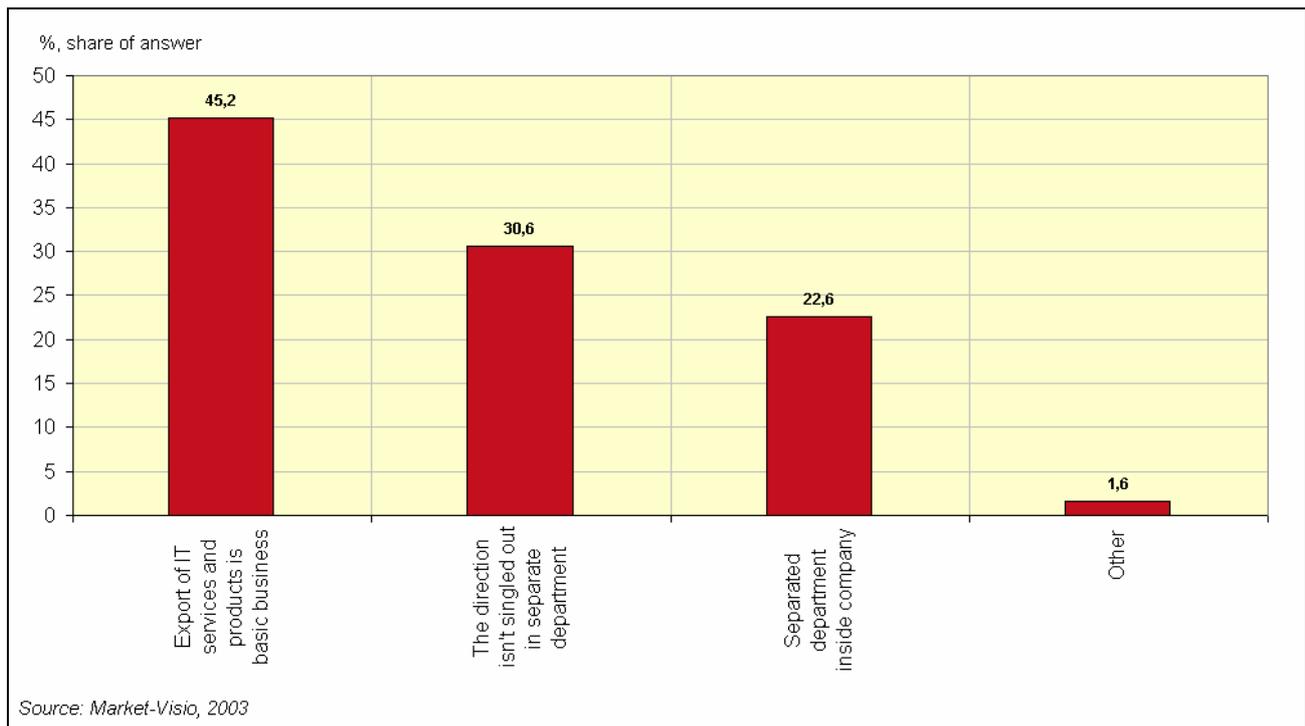
Outsourcing services of routine business processes are provided by a quarter of Ukrainian IT services and products exporters.

According to feedback from market experts, export revenue of software products amounted to 10-15% of the entire market for IT services and products export in 2002 in spite of the substantial share of companies that use product business model (including the combined one).

About one third of the research participants plan to change their business model by 2004-2005. Mainly, the companies which use the business order model plan to change it to the product model.

According to experts, the share of software products' export in Ukraine might increase up to 30-35% out of the entire IT services and products export market by 2005.

The picture 1.4 shows the data on the status the research participants' export-oriented software development department.



Picture 1.4. Departments responsible for IT service and products export

IT-services and products export is the main business for almost half of research participants. Correspondingly, these companies are mainly focused on rendering services to foreign customers.

About 30 % of the companies are involved in IT-services and products export. These companies render services to internal customers as well as external, at the same time the export business is not a separate direction of their activity.

More than 20 % of the companies have singled out a department of IT-services and products export. These companies render services to both domestic and foreign customers. However, the export of IT-services and products is singled out to a separate department.

To a great extent, the IT-services and products export is the basic business for small (less 15 persons) and large (more than 80 persons) companies. Medium companies are more differentiated and provide services to domestic and foreign customers. This is why the export business is either not separated from the entire development department, or singled out as an independent department.

About 28% of research participants plan to change the status of IT-services and products export department during 2004-2005. Generally speaking, this is planned by companies, where rendering of services and product is in competence of the common department of software development. Probably these companies plan to single out export business into individual department/direction.

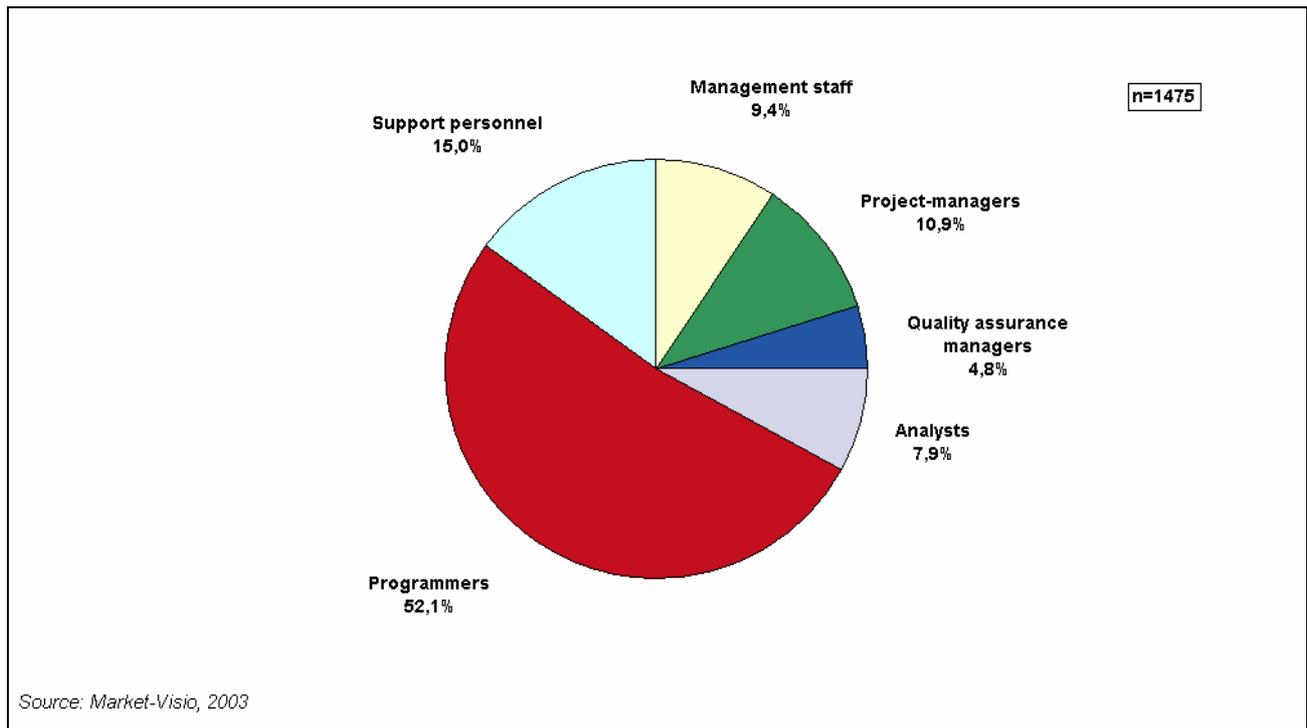
1.4. The number of suppliers and software developers

150 Ukrainian companies involved in IT- services and products export have been proposed to participate in the research.

According to experts, at about 300 companies are involved in IT-services and products export in Ukraine nowadays.

The entire number of specialists working in IT- services and products export in Ukraine is estimated to range between 8,000-10,000.

The picture 1.5 shows the structure of specialists involved in IT-services and products export working in participant companies of research.

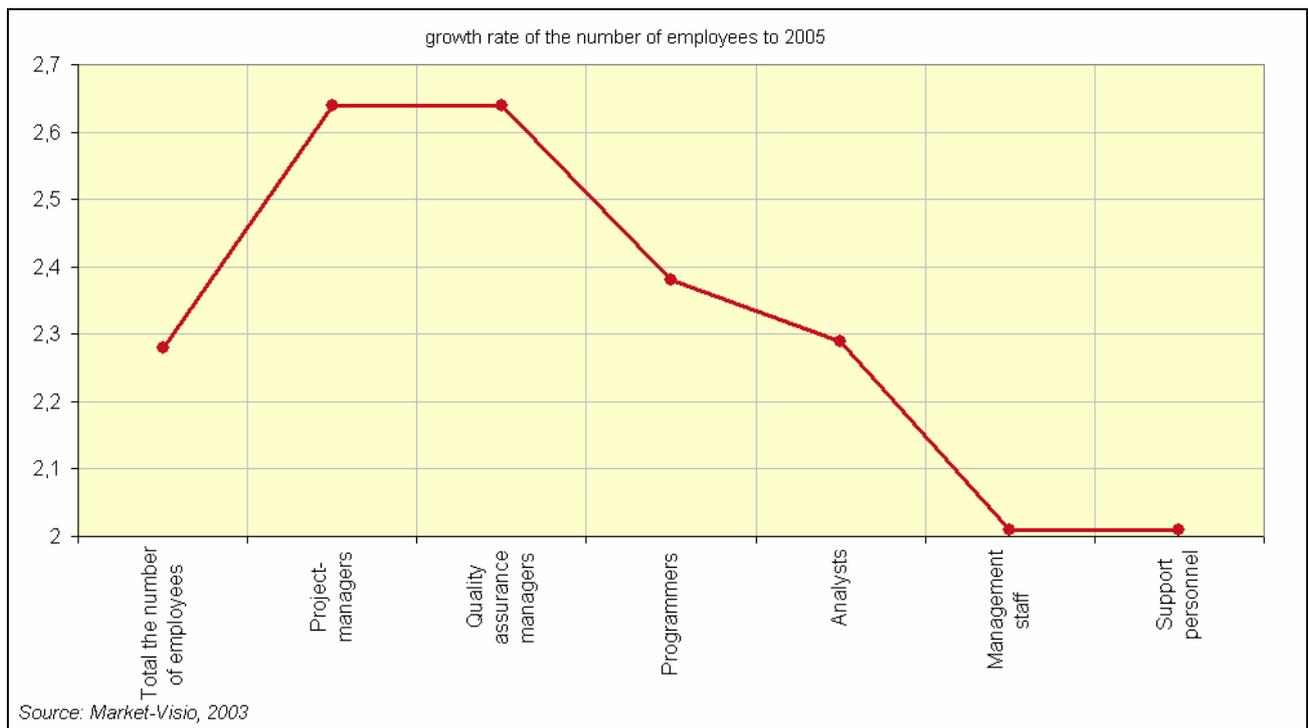


Picture 1.5. Structure of employees involved in IT service and products export business

Programmers reach more than a half of personnel involved in IT-services and products export in participant companies.

Management personnel comprise about 10 % of personnel involved in IT-services and products export.

The picture 1.6 shows an estimation of growth rate of the number of employees in participating companies.



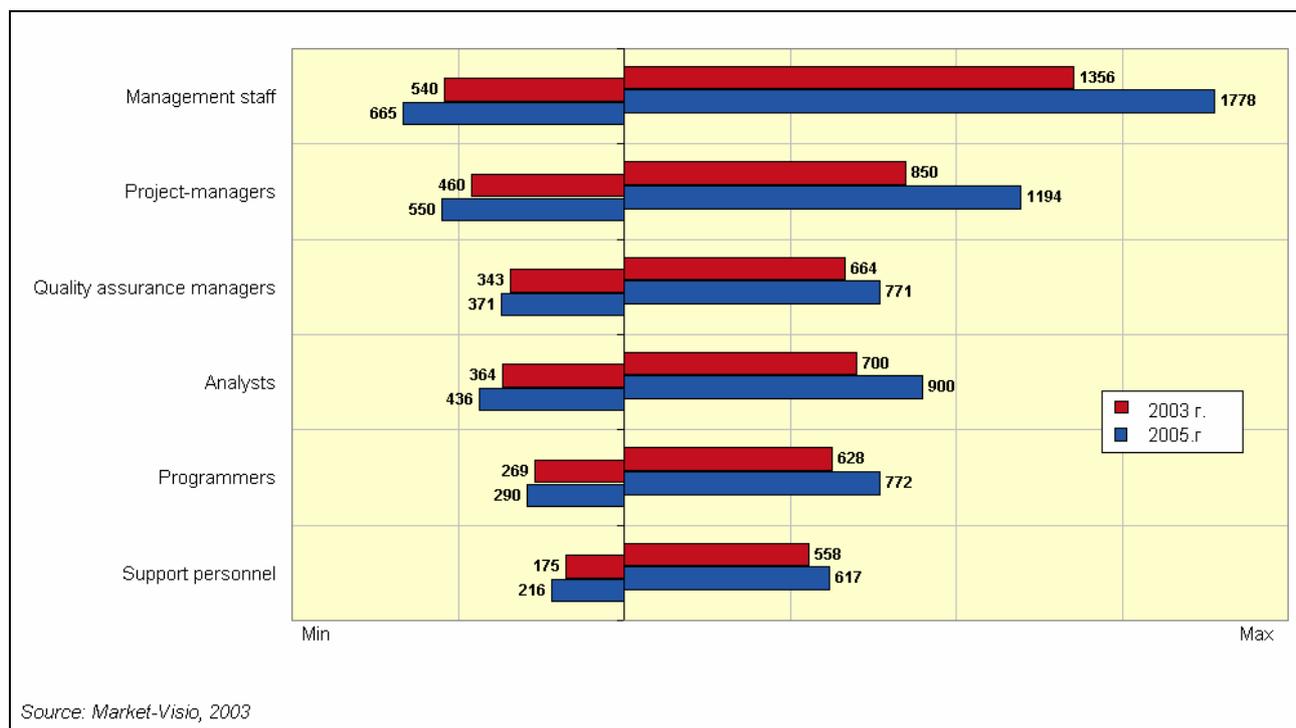
Picture 1.6. Growth rates of the number of employees involved in IT service and products export business to 2005

According to feedback from participant companies the total number of their employees will either double or even triple by 2005. The number of project and quality assurance managers will increase most substantially (almost triple compared to their number in 2002).

It is forecasted that the growth of management and assistant personnel will be the least substantial.

Remarkable growth in the number of project and quality managers is connected with a tendency of Ukrainian IT – services and products exporters to improve their services as well as with necessity to acquire international certification.

The picture 1.7 shows average salaries of the specialists of the companies involved in IT service and products export business.



Picture 1.7. Max and Min salaries of employees involved in IT service and products export business

At the moment the maximal salary of management staff accounts for around 1400-1500 USD per month. The maximal salary of engineering staff accounts for about 600-850 USD per month.

By 2005 the respondents forecast increase of management staff salaries on the average by 20-25% (up to 1800 USD) and engineering staff salary by 25-30%.

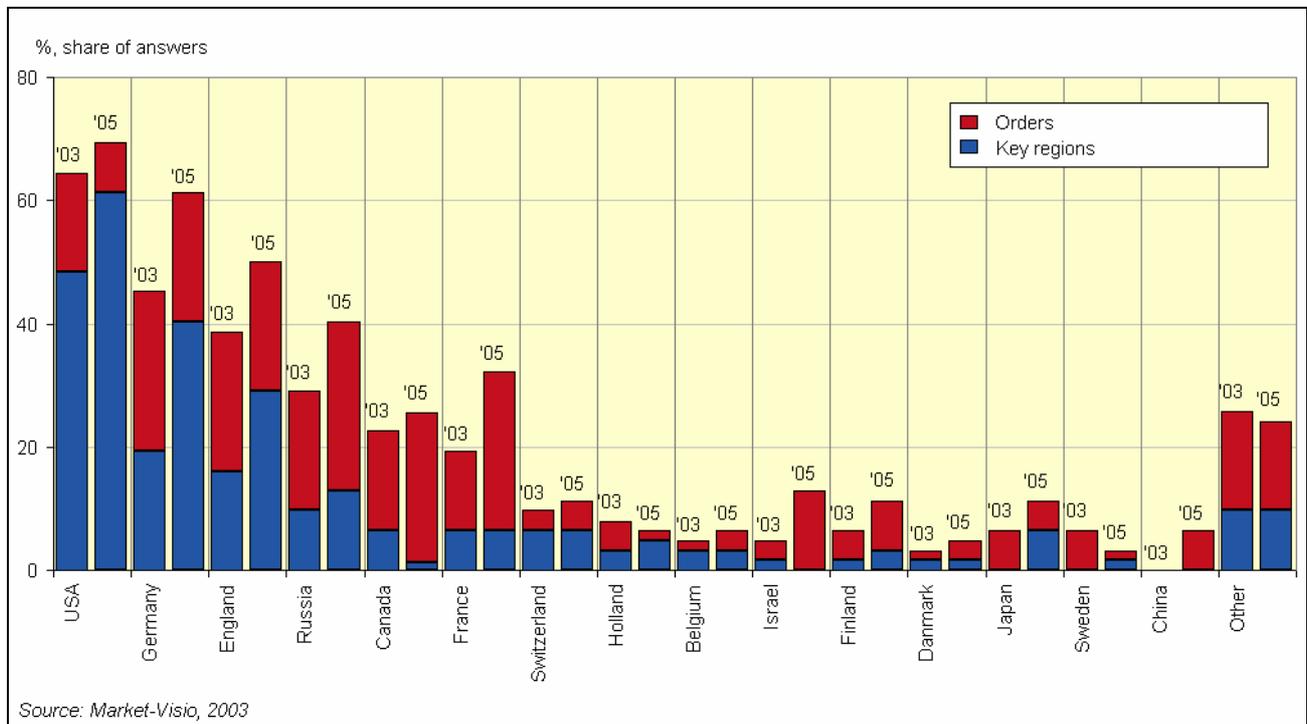
In whole Ukraine the average salary of management staff accounts for 1000 USD, engineering staff – about 500 USD.

According to the Market-Visio research conducted in the beginning of 2002 in Russia's average salaries of management and engineering personnel were 1150 USD и 730 USD per month. Taking into account salaries growth dynamics in Russian companies involved in IT services and products export business, we can say that in Ukraine average salary in the companies engaged in the export business is 30-50% lower compare to Russian companies.

1.5. Key regions

In the course of the research the respondents were offered to name the key regions of their export business.

The picture 1.8 shows data related to countries who are the customers of the Ukrainian companies engaged in IT services and products export, as well as importance of each countries and perspectives up to 2005.



Picture 1.8. Key regions of Ukrainian IT service and products exporters

At the moment the biggest client of the Ukrainian IT companies is the USA. Besides, significant part of IT services are provided to the countries of Western Europe and Russia.

In 2005 the USA status as the main customer of IT services and products will stay the same, nevertheless, the importance of the customers from Western Europe will increase significantly.

The importance of the Russian customers of IT services and products will increase as well, although, according to the respondents' opinion they consider Russia as less perspective compare to the USA and Western Europe.

Some of the participants' clients named included:

Alcatel	France Telecom	Motorola
CitiBank	General Electric	NASA, Boeing
DASA (DaimlerChrysler Aerospace)	Governmental bodies in North America and Western Europe	Nokia
Deloitte & Touche Tohmatsu	IFC	NY Stock Exchange
Delta Airlines	ING Bank	Paramount Pictures
Deutsche Telekom	Ingersoll-Rand International Sales Inc.	Rabo Bank
DHL	Intel	Siemens
Disney	Mellon Financial Group	T-Systems Nova
Euronex	Microsoft	Visteon
Fiat Avia		Westinghouse Electric
Ford		WorldBank

1.5. Key competitors

The respondents were asked to point out the largest companies engaged in IT services and products export in Ukraine and name the main countries-competitors on IT service and products export market.

The most quoted companies included (who were mentioned more than 10 times) were Miratech, SoftLine, Softserve, and TelesensKSCL.

The table 1.1 shows countries which are the main competitors of the Ukrainian IT services and products export business according to the respondents' opinions.

Table 1.1. Main countries-competitors of the Ukrainian IT service and products export business

Countries	Number of mentions
India	44
Russia	37
China	11
Romania	11
Belarus	8
Ireland	5
USA	3
Czechia	3
Bulgaria	2
Israel	2
Pakistan	2
Asian countries	1
Eastern Europe	1
Canada	1
Korea	1
Poland	1

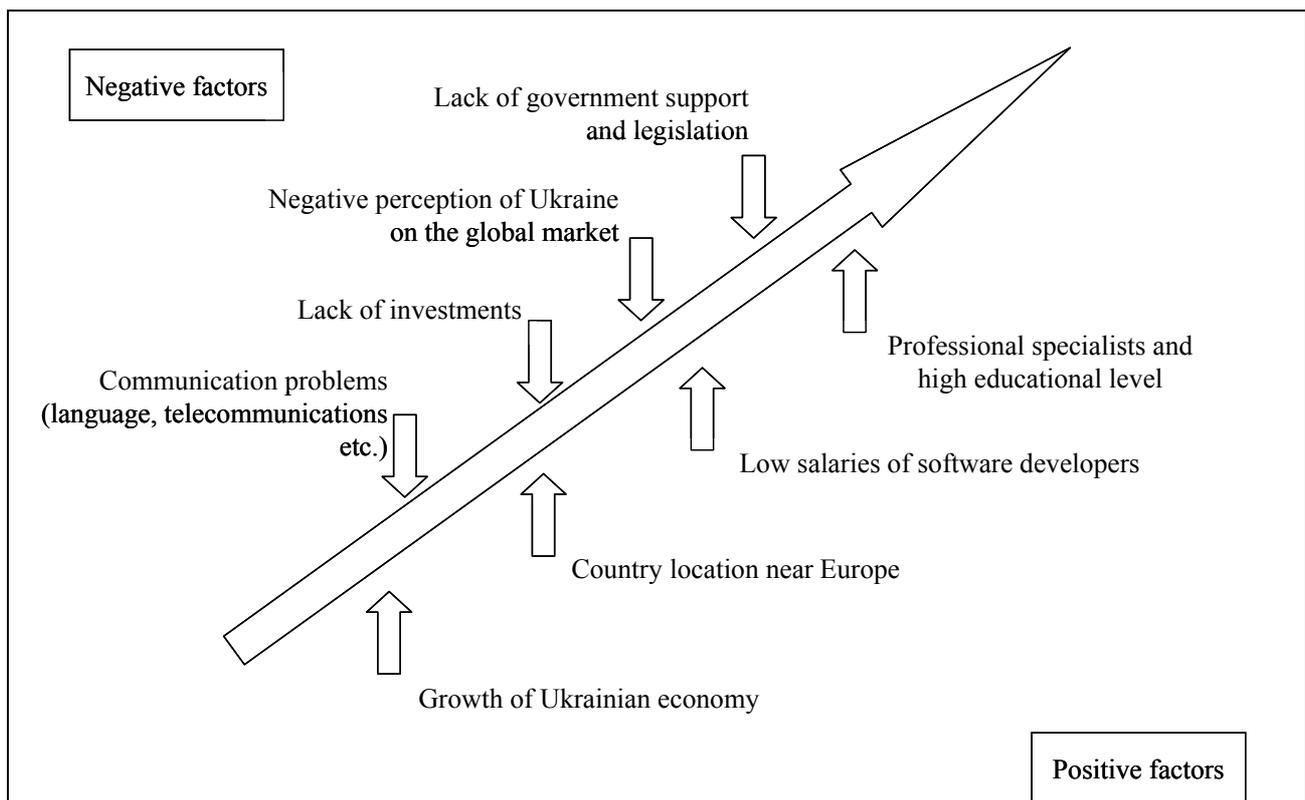
According to the respondents companies from India, Russia, China and Romania are considered to be the main competitors of the Ukrainian IT services and products exporters.

1.6. Market trends

In the course of the research the respondents were asked to name main trends on Ukrainian IT services and products export market. Majority of the respondents pointed out the following main market trends:

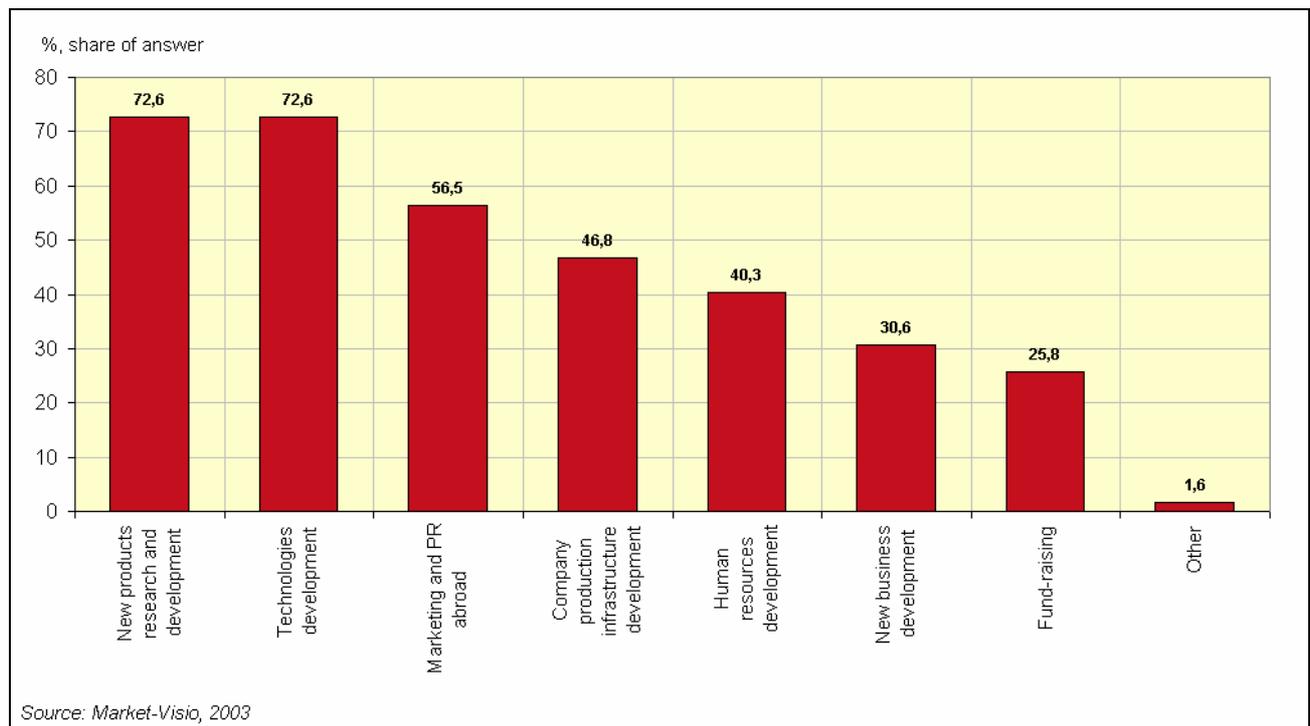
- Market consolidation and existing players integration;
- Stable growth of IT services and product export market;
- Professional development of specialists, involved in IT services and products export business;
- Increase in professional association activity;
- Certification necessity;
- Unique niches search;
- Domestic competition increase;
- Increase of software products export.

The respondents also were asked to name positive and negative factors affecting Ukrainian IT services and products export market (picture 1.9).



Picture 1.9. Factors affecting Ukrainian IT service and products export market

The picture 1.10 show the main priorities of the Ukrainian companies in development of IT services and products export business for the next 2 years.



Picture 1.10. Main priorities in IT service and products business development

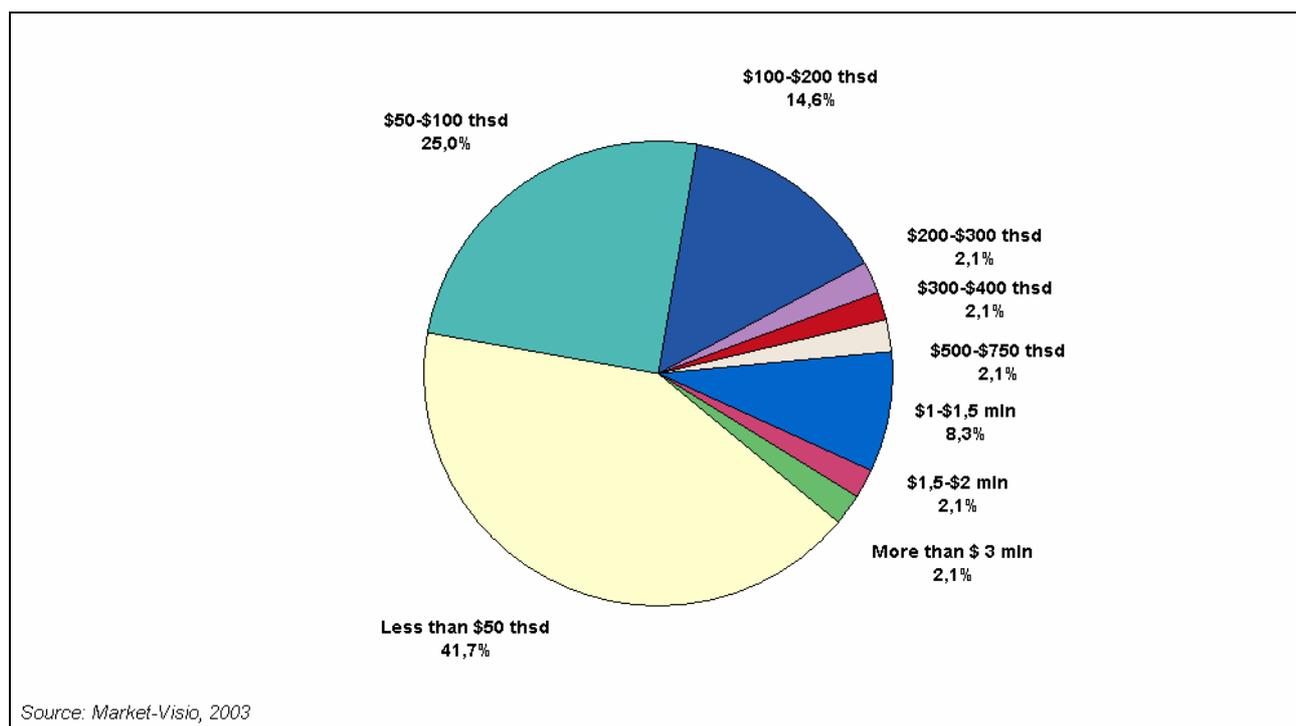
The main development priorities for the majority of Ukrainian IT services and products exporters will be research and development of new products as well as software compiling tools development. Thus, the key priorities for Ukrainian companies are increase of product export and new software development technologies implementation.

2. Ukrainian IT services and products exporters characteristics

2.1. Companies turnovers in 2002 and dynamics up to 2005

In the course of the research the respondents were asked to name their turnover of IT services and products export business in 2002.

The picture 2.1 shows companies turnovers in 2002. The information was given by 77% of the respondents.



Picture 2.1. Companies turnovers in IT service and products export business

The IT services and products export business turnover of almost 70% of the companies participated in the research didn't exceed 100 thousand USD. Mainly, these companies are either small companies with the number of employees of 15 or mid-size companies for which IT services and products export is one of the activities.

All companies with export business turnover of more than 500 thousand USD are big companies with the number of employees of more than 80. As a rule, export business is their main activity and accounts for more than 50% of their whole business.

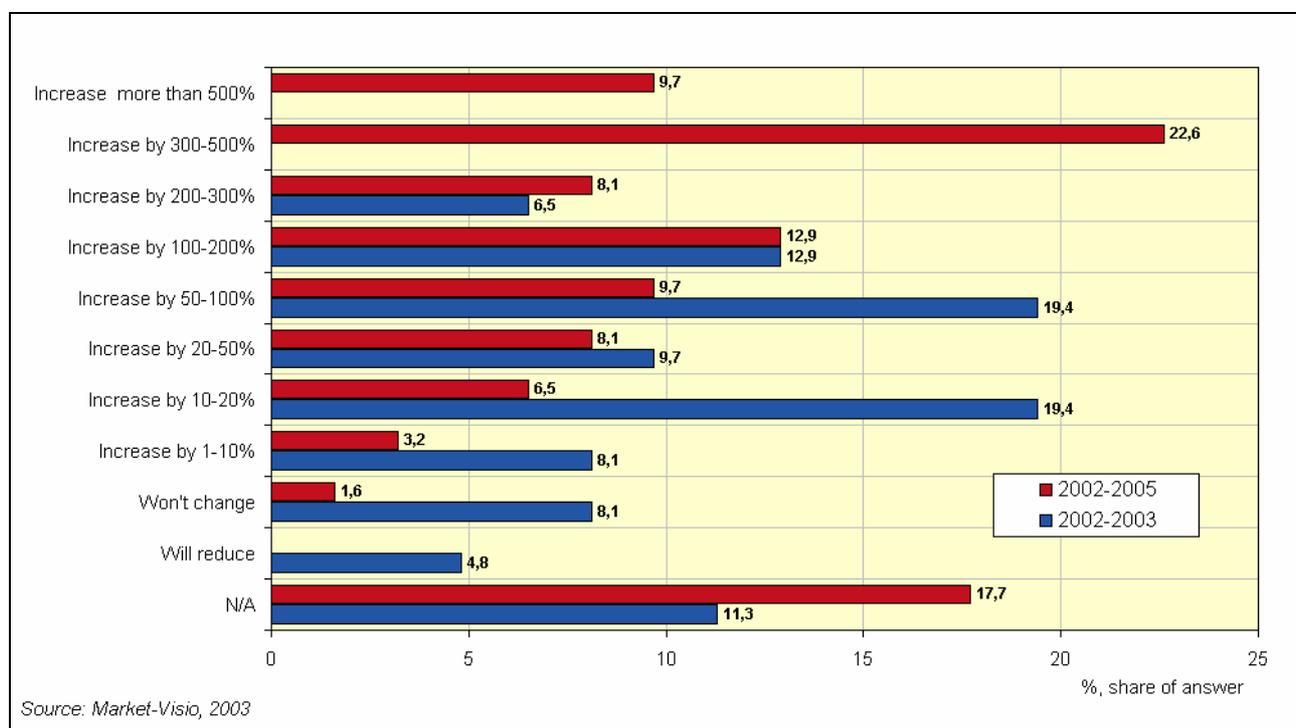
The Table 2.1 presents Market-Visio estimations concerning structure of Ukrainian companies by export business volumes and their market shares in 2002.

Table 2.1. Structure of Ukrainian companies by export business size

Company turnover (2002)	Market share, %	Number of the companies, %
more than \$1 mln.	75-80	8-10
from \$100 th. to \$1 mln.	15-20	20-25
Up to \$100 th.	10-15	65-70
Total:	100%	100%

According to the experts at the moment approximately 300 Ukrainian companies are involved in the IT services and products export business. Thus, it is possible to estimate that more than $\frac{3}{4}$ of Ukrainian IT services and products export is made by 25-30 biggest companies.

The picture 2.2 shows the respondents' estimations related to dynamics of their IT services and products export business.



Picture 2.2. Dynamics of IT service and products export business

Significant part of the respondents believes that in 2003 their IT services and products export business will increase either by 10-20% or by 50-100%.

10-20% increase of export business in 2003 is forecasted basically by companies, with IT services and products export volumes in the whole company business being less than 50 %.

For the companies planning 50-100% increase of their export this type of business is their core activity. Mostly, such companies have turnover of more than USD 500 thousand.

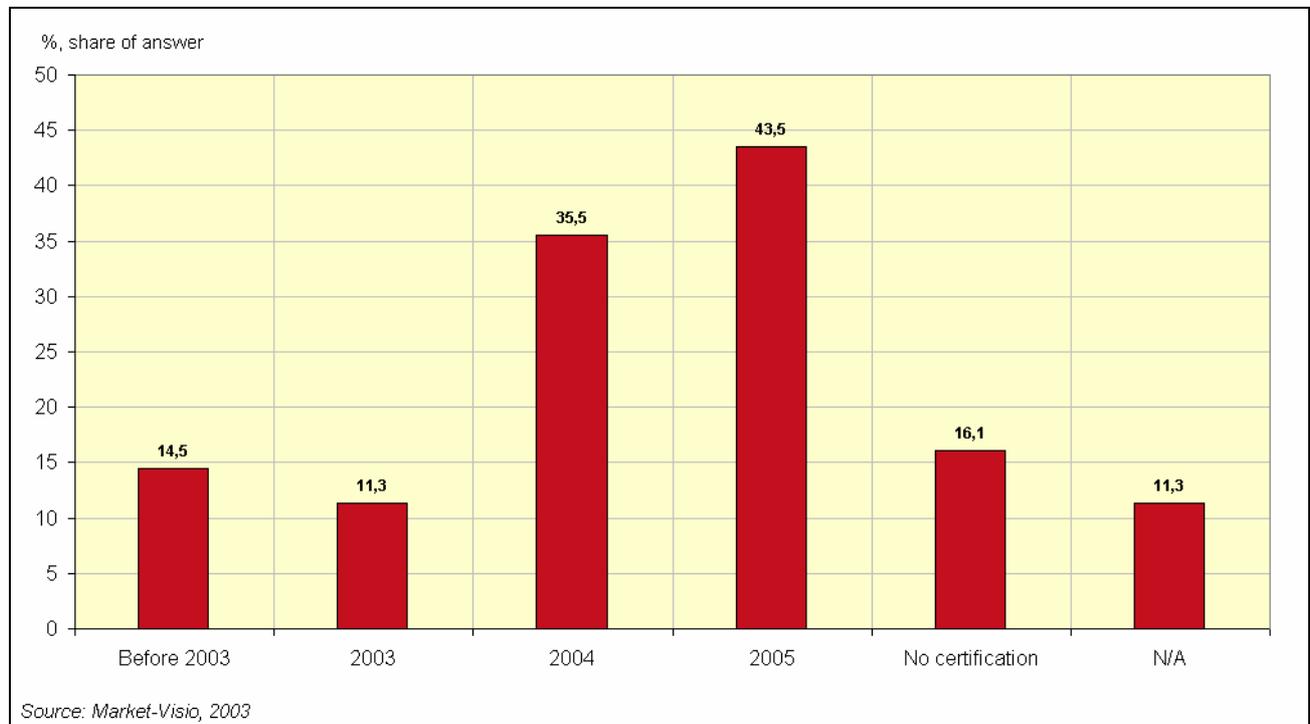
More than 100% increase of export business in 2003 in comparison with 2002 is expected mainly by small companies.

More than half of the respondents believe that IT services and products export business of their companies will increase more than twofold from 2002 to 2005. More than 20% of the respondents forecast five-six time increase of their export business.

2.2. Companies' certifications

One of the company development level indicators are the quality certification of their software development processes. Many respondents stated that obtaining a certificate is one of the main company's priorities.

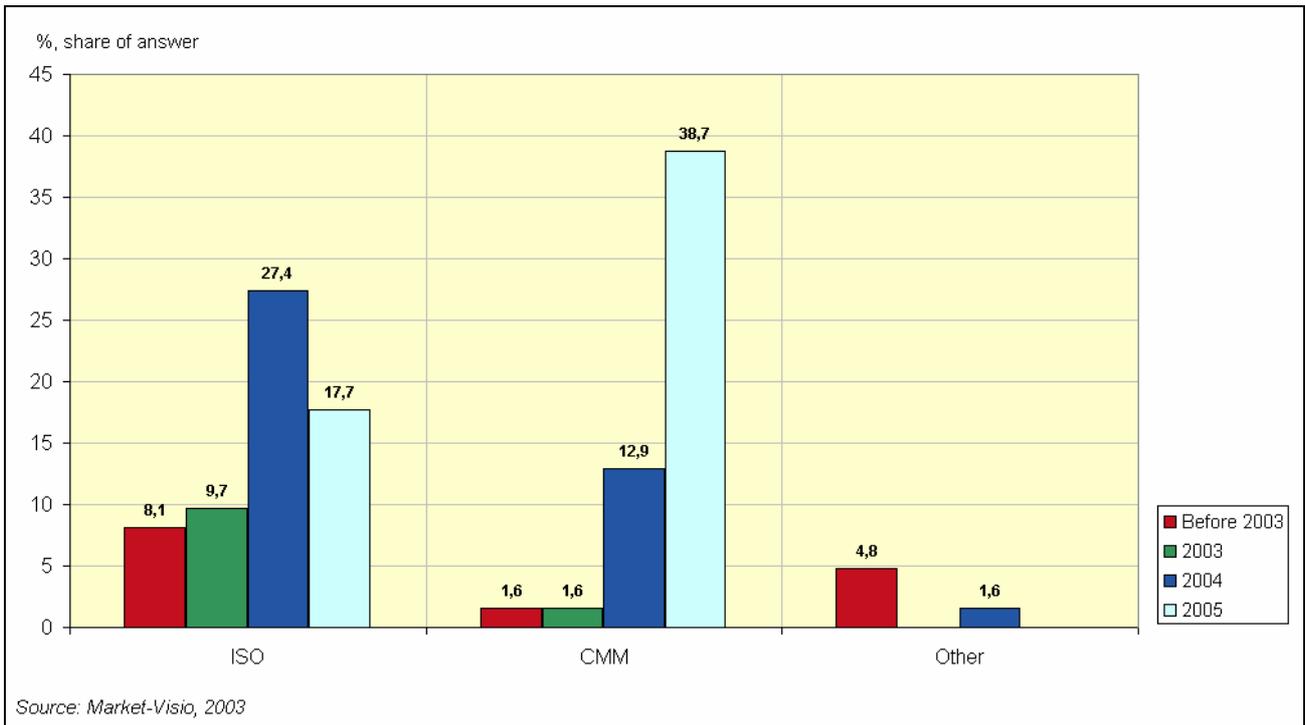
Picture 2.3 shows data and plans of interviewed companies concerning getting certificates before 2003 and 2005.



Picture 2.3. Companies certifications in 2003-2005

By the end of 2003 almost 25% of the respondents are planning to get certified.

The picture 2.4 presents data on current state and plans of the members of the research concerning the certification in 2003-2005.



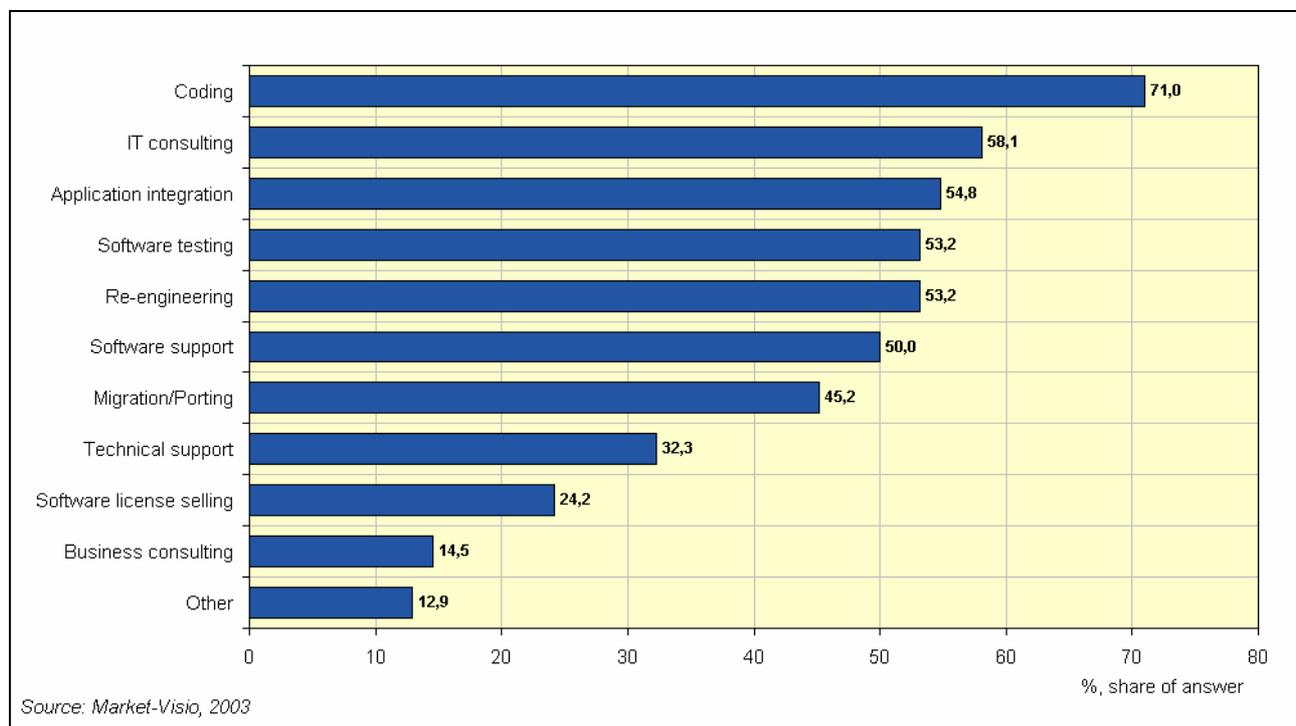
Picture 2.4. Availability of certificates in 2003-2005

Substantially, companies plan to receive ISO certifications in 2003 and 2004. Along with this mostly companies plan to receive CMM certificates before 2005.

According the data received we conclude that by 2005 Ukraine’s market of offshore IT services is going to be very attractive and forward looking for the companies offering services of CMM certification.

2.3. Demand of services and solutions

Under the Ukraine offshore market study the respondents were offered to mention the services and products that exporters offer to foreign customers (picture 2.5).



Picture 2.5. Demand of services

More than 70% of the interviewed companies offer to their foreign customers the service of coding.

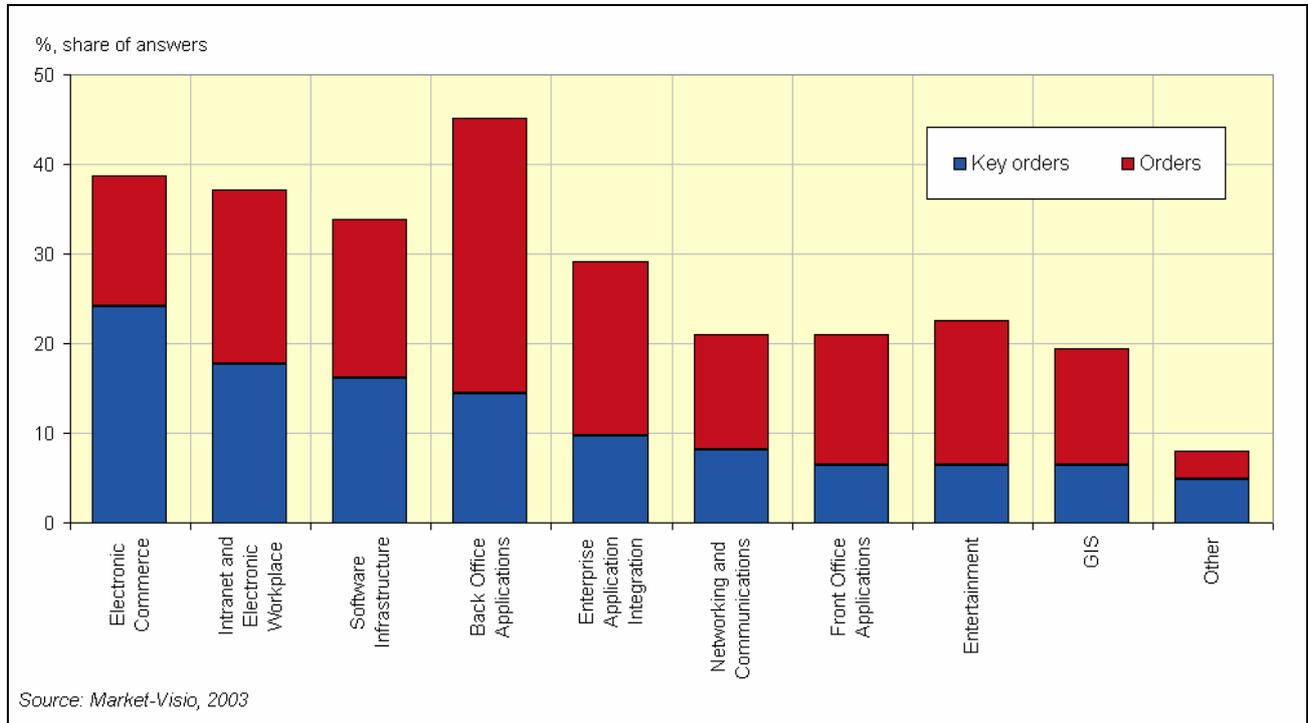
The second place is taken by the following services: IT consulting, application integration, software testing, re-engineering services.

The level of Ukraine companies' services popularity is very similar to the level of Russian IT - companies.

Based on the Gartner classification of the software development fields we estimate the demand for software solutions as follows:

1. Back Office Application
2. Electronic Commerce
3. Front Office Application
4. Internet and Electronic Workplace
5. Networking and Communications
6. Software Infrastructure
7. Enterprise Application Integration

The picture 2.6 represents line of Ukrainian companies' activities in the field of IT services and products. The respondents were offered to mention both the key lines in their activities and the secondary ones. The data is represented in the descending order based on the number of answers about companies' activities in key directions.



Picture 2.6. Demand of solutions

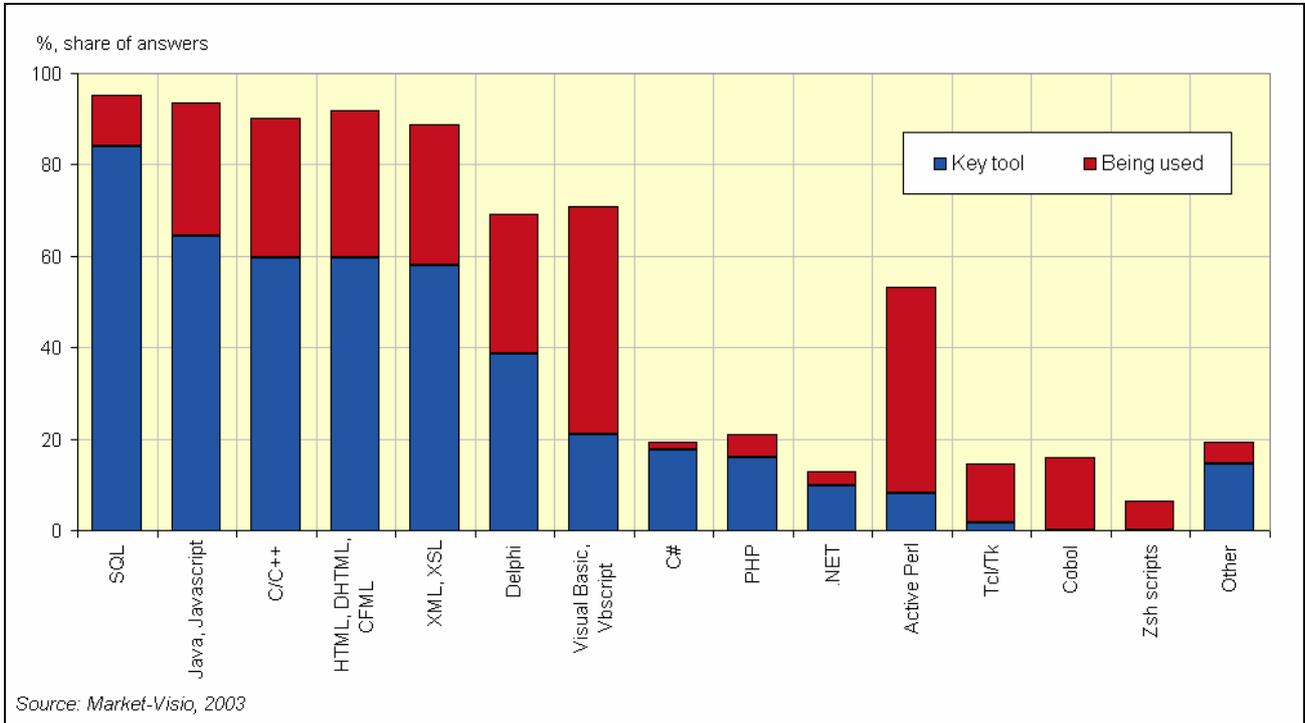
The main activity direction for the most part of Ukraine exporters of IT services is the development of electronic commerce applications, trading sites, back office applications and software infrastructure.

The participants forecast an increase in orders for Back and Front office applications and integration of corporate applications, as well as increased deal flow from entertainment segment by 2005.

2.4. Platforms and development tools

During the research process the respondents were asked to mention the platforms and working techniques they are usually using.

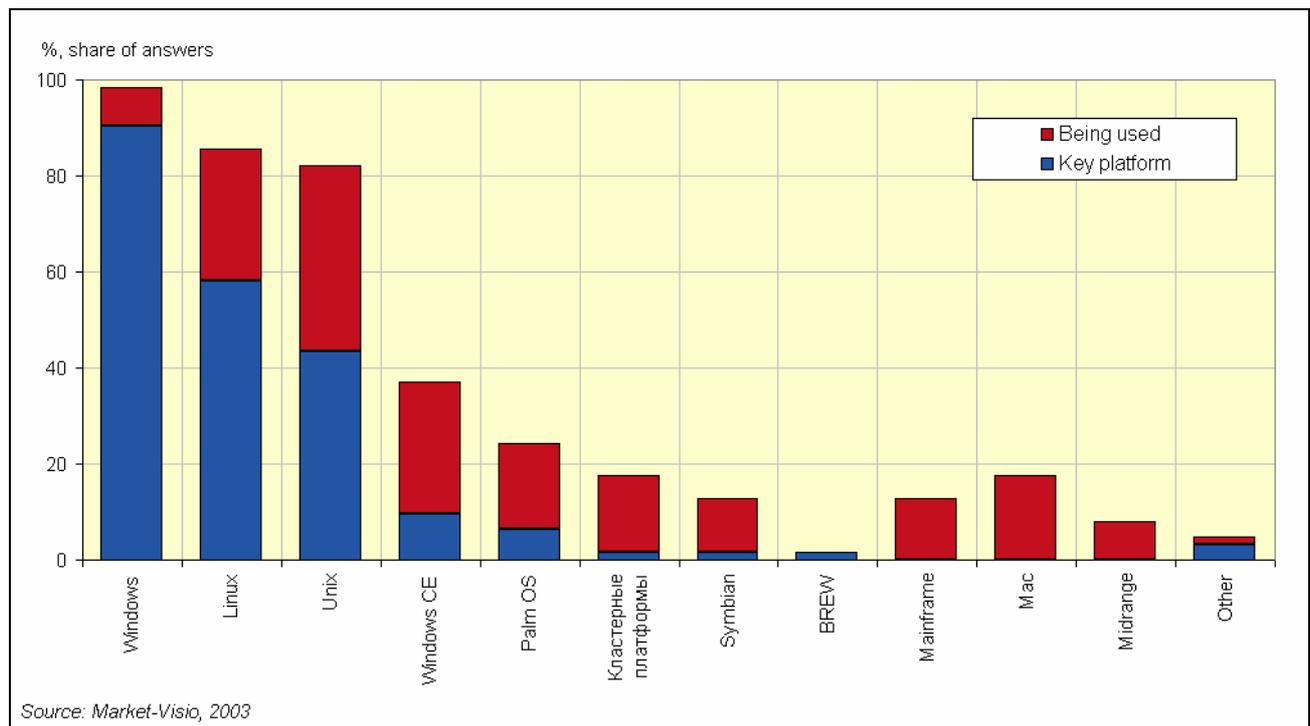
The picture 2.7 shows the level of popularity of different programming languages among the Ukraine exporters of IT services and products.



Picture 2.7. Programming languages

For the most part of Ukrainian exporters of IT services the key set of programming languages consists of SQL, Java, HTML, DHTML, CFML, XML, XSL.

The picture 2.8 represents the data about the level of prevalence of different platforms among the Ukraine supplier of IT services and products.



Picture 2.8. Platforms

The most popular programming platform among Ukraine exporters is Windows. Almost 100% of the companies use it; moreover 90% of the companies are using it as a primary platform.

Linux and UNIX platforms are used by 80-85% of Ukrainian IT services exporters, but no more than 60% are using these platforms as the primary ones.

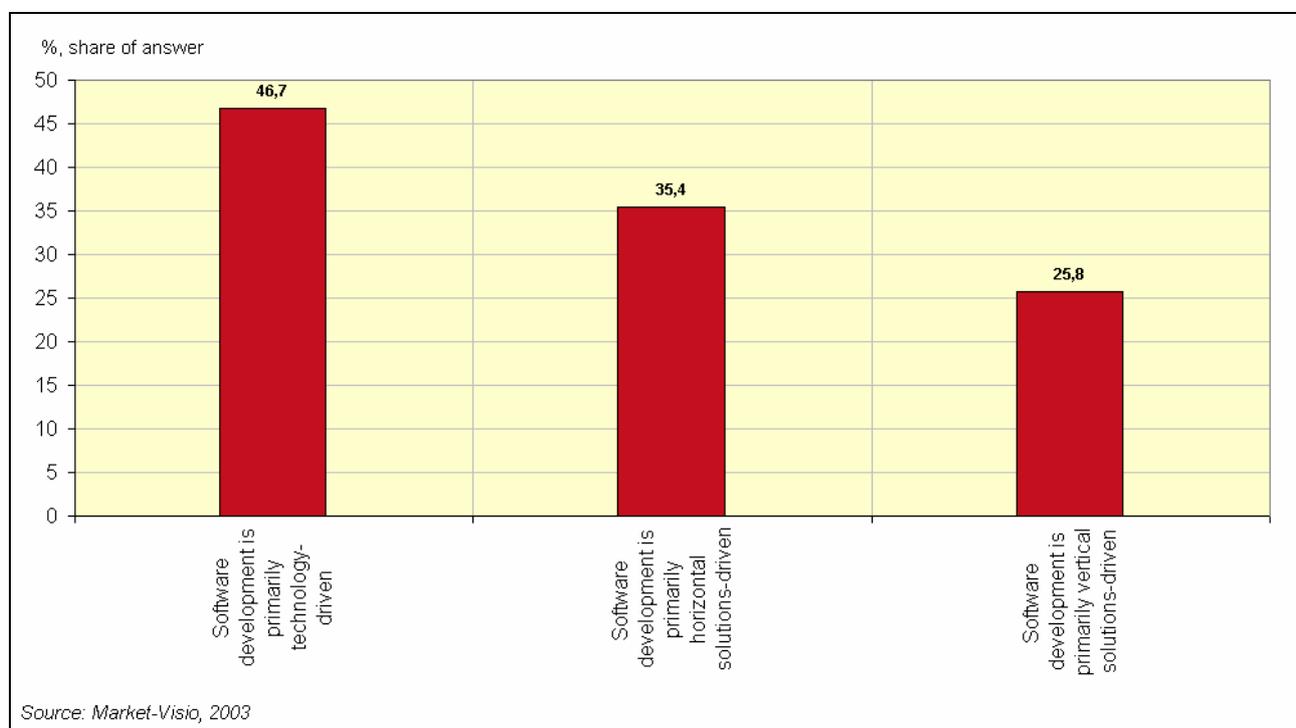
3. The strategies of software exporters

3.1. The orientation in export of IT products and services

During the research the respondents were asked to mention one of three fields (development of software) their company is oriented towards:

- The software development is technology-driven (developing software for specific technologies, platforms)
- The software development in the company oriented towards horizontal solutions (the development of software in specific fields, for instance CRM-solutions)
- The software development in the company is primarily focused on the vertical solutions for special fields

The results are shown on the picture 2.9.

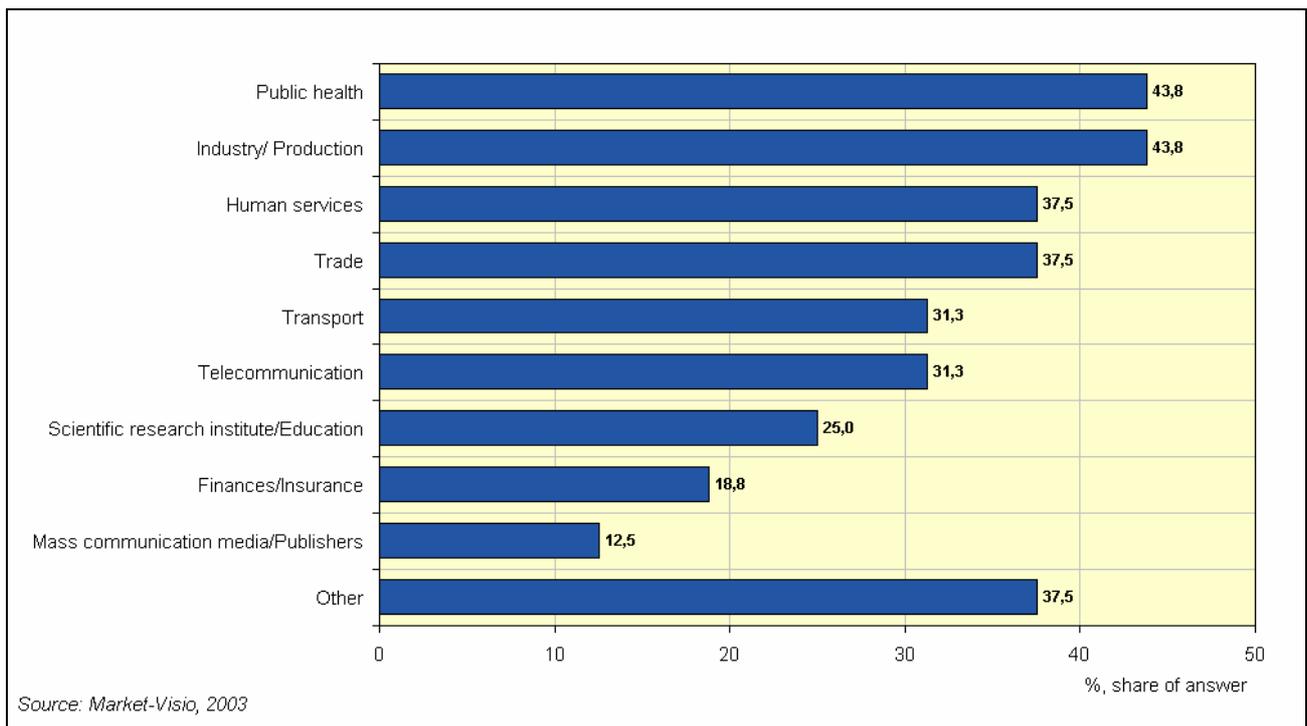


Picture 2.9. Companies approaches in IT service and products export business

Presently, the majority of Ukrainian companies are focused on developing software for special technologies and platforms. The vertical orientation is the least popular one.

The companies oriented towards production of vertical solutions were asked to name industries they were producing the software for.

The results are shown on the picture 2.10.



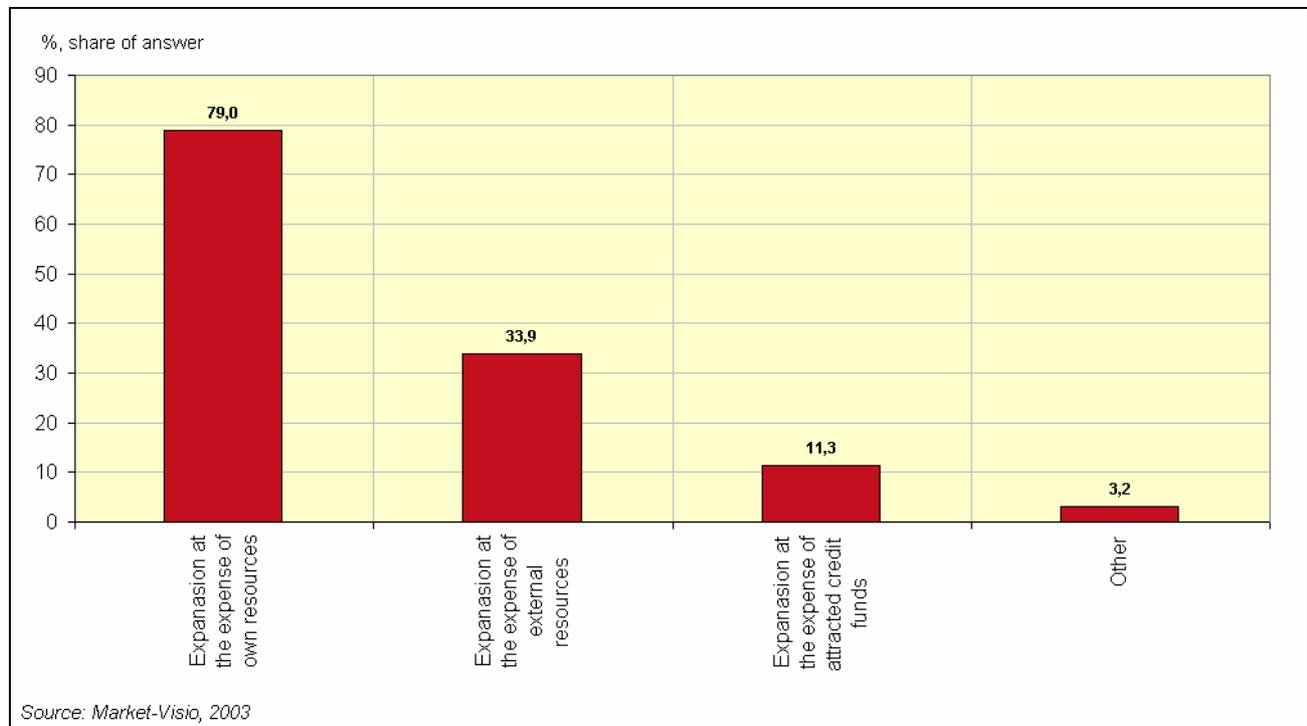
Picture 2.10. Industries of vertical solutions-driven companies

Mostly, the companies oriented towards development of vertical solutions are working in public health, production industries, as well as for service and commercial businesses.

3.2. Channels and methods of IT services and products promotion

During the market research the respondents were asked to mention the most perspective strategy within the 2 year-period on the market of the IT products and services export.

The results are shown on the picture 2.11.



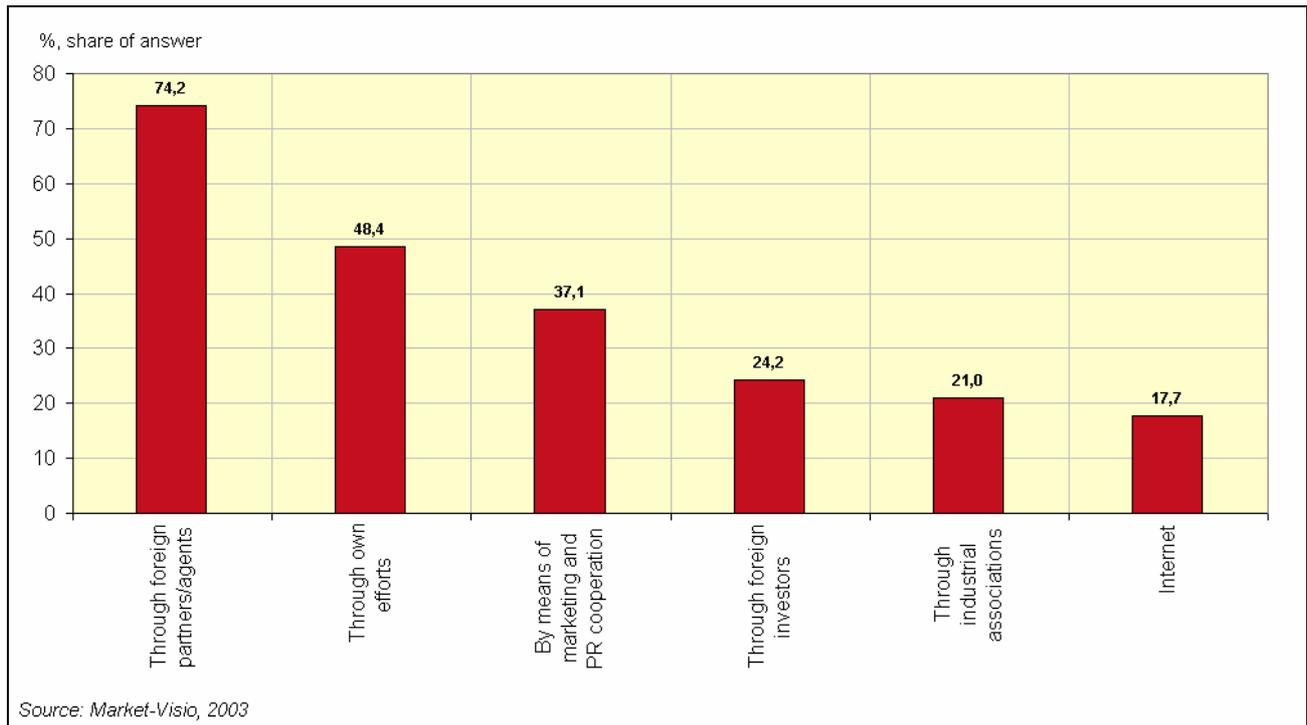
Picture 2.11. Expansion strategies of Ukrainian IT service and product exporters

The most part of the research members are planning to develop their businesses on own account.

33% off all respondents plan to develop their businesses by using external investigations and 11% plan to use credits.

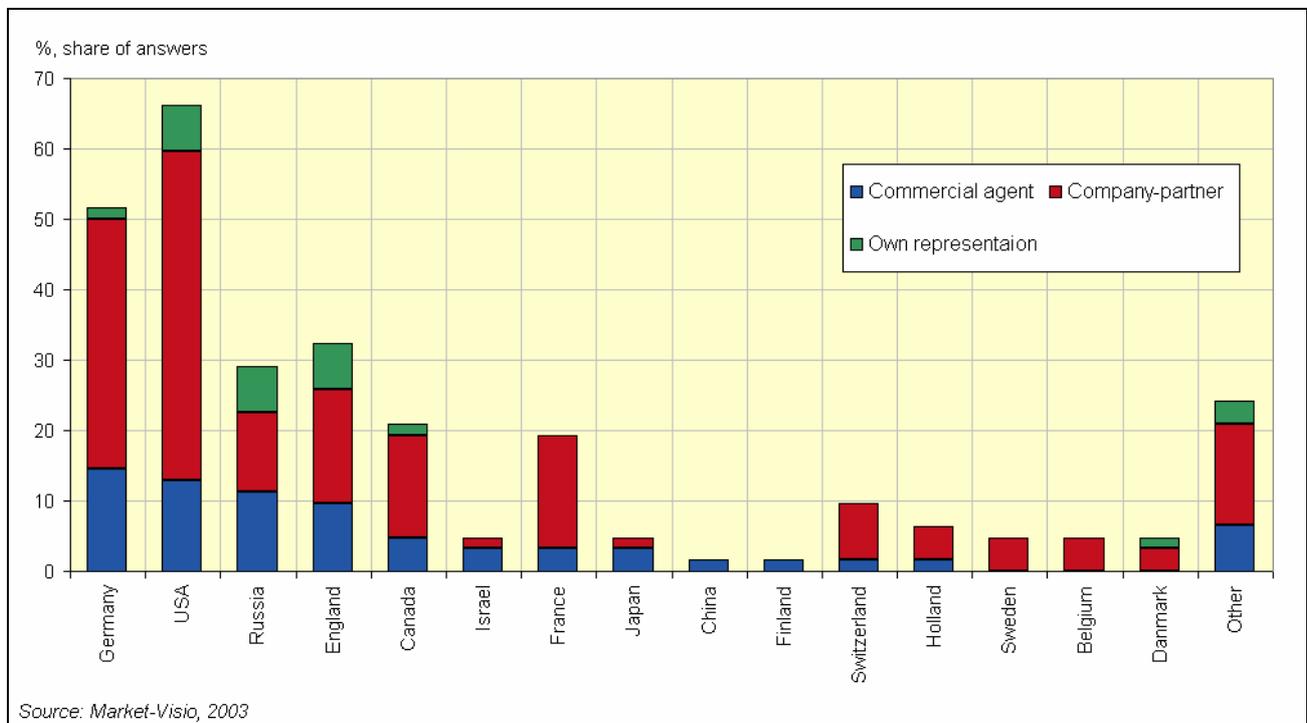
The members of the research were asked to list the most perspective promotion methods in the field of the export of IT products and services.

The results are shown on the picture 2.12.



Picture 2.12. Promotions methods of Ukrainian IT service and product exporters

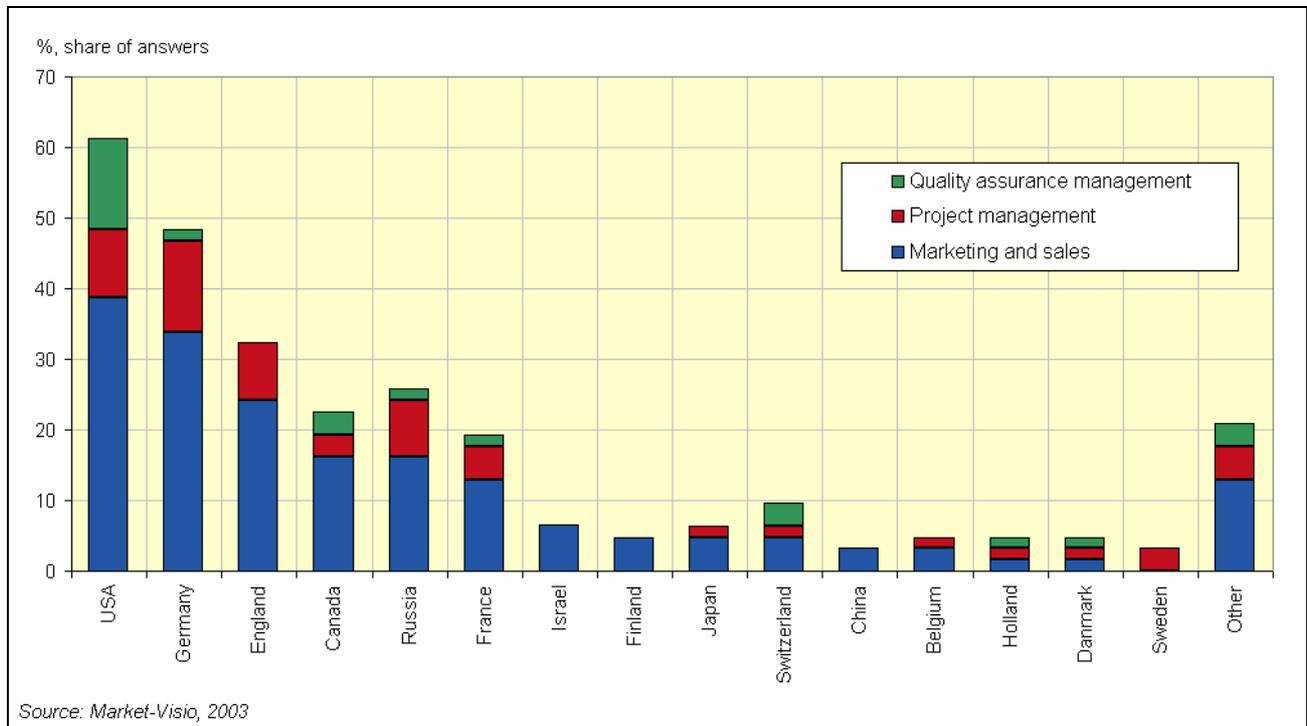
Most of the companies believe that the Ukrainian companies should promote their IT products and services by their foreign partners/agencies. This opinion is confirmed by the data about the amount of representative offices of Ukrainian companies (exporters of IT production and services) abroad (picture 2.13).



Picture 2.13. Representations level of Ukrainian IT service and product exporters in key regions

Commonly the Ukrainian companies have either partners or brokers in the foreign countries. Just few of them have representation offices in the countries, which are most important for their business.

The picture 2.14 shows the information on the functions of Ukrainian representatives abroad.



Picture 2.14. Functions of Ukrainian IT service and product exporters representatives in key regions

The main function of the majority of Ukrainian representative offices are marketing and sales promotion. The projects core management mostly is a responsibility of the key customer, whom Ukrainian IT companies are working.

4. Information about participating Ukrainian IT companies

4.1. Expert Group

This report has been prepared under due support of the Expert Group that was gathered within the framework of this research. We'd like to sincerely thank all of its members who generously agreed to help us with revision of the content and development questionnaire's structure, were involved in development of the list of companies to be interviewed, and supported the actual interviewing the participants of research and data collection.

The Expert Group has demonstrated the unprecedented in Ukraine model for business research where the members of different (and sometimes competing) companies and organizations were involved in the research process contributing to its objectivity and transparency.

As a result of the Expert Group's efforts, we were able to conduct the first research of Ukrainian IT-industry of such a scale. We are looking forward to further promotion of the research and its participants worldwide.

We'd like to thank the following companies and individuals who were committing their time, experience, effort and expertise to the development of this report and any their future efforts in its dissemination and industry promotion:

1. **Bilodid Vladimir**, Director General - Tessart
2. **Gengler Emmy B.**, Co-Founder & CEO - Softjour
3. **Lyubyvy Dennis**, Managing Director - Internet Consulting & Communications (ICC)
4. **Maznyuk Victor**, Maznyuk Victor - The Ukrainian Hi-Tech Initiative
5. **Royenko Nikolay**, President - Miratech
6. **Salenko Serhiy**, Coordinator - eSP-Consortium
7. **Sivitsky Yuriy**, Marketing VP President - Softline
8. **Spiridonov Victor**, Executive Director - The Ukrainian Association of Software Developers
9. **Zinchenko Roman**, Business Development Manager - Ukrainian Software Consortium

We'd also like to express our gratitude to the following interviewers:

1. **Kovalchuk Andriy**, Project manager – AVentures, Coordinator of the Research
2. **Anchishkin Yegor**, Project manager - AVentures
3. **Murga Elena**, Analyst - Miratech
4. **Parkhisenko Yaroslav**, Project manager - AVentures
5. **Ryabets Igor**, Project manager - Softline
6. **Todosiychuk Irina**, Associate - UASWD
7. **Vidaykin Ivan**, Project manager - AVentures

We understand the importance of objective and unbiased data representation on Ukrainian IT-industry and hope this type of research will be conducted on regular basis to provide reliable and up-to-date information from recognized and trusted experts.

Loboyko Serhiy,
Business Development Manager, AVentures,
Manager of the project "Research of Ukrainian
IT-Export industry"

Makedonski Sergei,
General Director,
Market-Visio

4.2. Sponsors and business unions



Company name	Infopulse Ukraine
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E-mail:	info@infopulse.kiev.ua
Address:	Ukraine, Kiev, 24 Polevaya str.
Telephone/fax:	(044) 495-57-23/495-57-24
Company director	Alexey Sigov / sigov@infopulse.kiev.ua
Offshore software development director	Andrey Anissimov / Andrey.Anissimov@infopulse.kiev.ua
Year of foundation, the year offshore development was started	1999, 1999
Certification	2004 planned – standard ISO 9001:2000
Founders	Ukrainian and foreign founders (Netherlands)
Business model	Custom-built software development
Staff number	Operative personnel – 95 persons (Project Managers – 12)
Services	<p>Kind of operations performed: Custom-built software, reengineering, migration/porting, software testing and QA, software support, maintenance servicing, applications integration.</p> <p>Specialization: Financial applications, Electronic Commerce, E-procurement, SCM solutions, Back Office Applications, Front Office Applications, Web Development, Networking and Communications, Telecom applications, Embedded software solutions, Wireless solutions, Enterprise Application Integration.</p>
Development tools used	<p>Focused on Architecture solution .NET, EJB and COM/DCOM/COM+, CORBA, RMI, SOAP, XML/XSL technologies.</p> <p>Фокус на архитектурные решения .NET, EJB и технологии COM/DCOM/COM+, CORBA, RMI, SOAP, XML/XSL.</p> <p>Program languages and RAD: C/C++/STL, C++/MFC/ATL, C#, Visual Studio (Visual C++, Visual Basic, etc.), VBScript, Perl, Java, JavaScript, Delphi ASP, JSP, HTML, DHTML, WML Script, WML, SQL, Apache, Visual Age for Java 3.6, Visual Age for C++ (OS/2 and Windows platforms), Visual Cafe, JBuilder 4.0, JDeveloper (3.2), DreamWeaver UltraDev Studio 4, ColdFusion Studio 5.2, InstallShield Professional (5.3, 6.0), Windows Installer 1.5, PowerDesigner 7.5, WindRiver Tornado 2.0, WAP, TTML</p> <p>MS technologies: BizTalk Server 2000, Commerce Server 2000, Internet Information Server 4.0 (5.0).</p> <p>RADs: IBM (Rational), Microsoft</p> <p>Methodologies: RUP, MSF</p> <p>OS, platforms: Windows 3.x/9x/2000/NT, OS/2, *NIX family (AIX, Solaris, Linux, SCO Unix), VxWorks, Mainframe, Portable Platform</p> <p>Oracle technologies: Oracle Developer/2000, Oracle Designer/2000, WebDB.</p> <p>Application servers: Oracle iAS 9i, Oracle iAS Wireless Edition 9i, IBM WebSphere, BEA WebLogic, Microsoft's MTS.</p> <p>DBMS: Oracle, MS SQL Server, Informix, DB2, Versant.</p>
Main clients	France, Netherlads, Belgium, USA, Germany
Development priorities	Marketing and PR for foreign customers, ISO and CMM certification



Company name	Internet Consulting & Communications Ltd (ICC)
Web-site:	www.icc.com.ua
E-mail:	office@icc.com.ua
Mail address	03126, P.O. Box 618/8, 03126, Kiev, Ukraine
Telephone/fax:	+38044 490-81-60 / 490-8162
Offshore software development director	Khodischenko Eugen / khodischenko@softpress.com.ua
Year of foundation, the year offshore development was started	2000, 2000
Founders	SoftPress Publishing House
Business model	Creation and development of Internet projects
Staff number	Staff – 7 persons (project managers – 2) Management – 1
Services	<ul style="list-style-type: none"> • Consulting services, web strategy development. • Web design, programming, project quality assurance. • Creation and development of large content projects.
Development tools used	<p>Languages: ++, Java, PHP, Perl, Delphi, ASP, Visual Basic, Visual C</p> <p>Platforms: Linux, Windows NT/2000</p> <p>Data bases: MySQL, MSSQL, Sybase Adaptive Server Enterprise</p>
Main clients	<p>SoftPress Publishing House, Olympus Optical Co. (Europa) GmbH, Ukrainian customers</p> <p>2001 – USA</p>



Company name	Microcosmic Group
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Telephon/fax	+380 (44) 236-2301, 236-2146
Company director	Denys Kotseba, President / kdl@mcgua.com
Offshore software development director	Denys Kotseba / kdl@mcgua.com
Year of foundation, the year offshore development was started	2000, 2000
Certification	No (SEI CMM Level 3 – compatible process)
Founders	Ukrainian and foreign founders (Korea)
Business model	Custom software development, IT-consulting
Services	Services: Application development, application integration, web-enabling Specialization: Electronic Commerce, Groupware, Intranet and Electronic Workplace, E-learning
Development tools used	<p>Platforms:</p> <ul style="list-style-type: none"> • MS Windows 9x/NT/XP/ME/2000/2003 • .NET • Pocket PC 2002/2003 • PalmOS • UNIX, Linux <p>Languages and Technologies:</p> <ul style="list-style-type: none"> • C/C++/C# • Visual Basic, VB.NET • Embedded Visual C++/Visual Basic • XML, XSLT • ASP, ASP.NET • PHP • Perl • HTML, JavaScript <p>DBMS</p> <ul style="list-style-type: none"> • MS SQL Server • MySQL • Informix
Main clients	USA, Germany
Development priorities	International marketing, establishing representative offices, developing own line of competitive products



Company name	Reaktivatе
Web-site	www.reaktivate.com / www.reaktivate.com.ua
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Phone / Fax	+ 38 044 235 58 75; + 38 050 33 444 13
General manager	Pavel Baranok; pbaranok@reaktivate.com
Offshore software development manager	Alexander Ivanov; aivanov@reaktivate.com
Year of foundation, the year offshore development was started	2001
Founders	Ukrainian private founders
Business model	Custom solutions development
Staff	Technical staff – 10 Management staff – 4
Services	Content management systems, ASP systems development, Commerce CRM and ERP solutions, Portals and community systems, Product and services catalogs with integrated ordering features, On-line publishing systems, Complete websites development, Web site design/redesign, FLASH presentations, Software interface design
Development tools used	<p>Platforms: MS Windows NT/2000 with IIS 4.0 or higher; UNIX operating systems (FreeBSD, Linux, Solaris, etc) with Apache; Any operating system with JDK 1.4 and TomCat installed</p> <p>Database: MS SQL, MS Access, MySQL, Oracle, Interbase</p> <p>Programming language: MS Visual C++, ASP.NET, C# (.NET technology), ASP 2.0 and higher, ColdFusion, PHP 3.0 and higher, Perl, Java Servlets & JSP, JDBC, Enterprise Java Beans, RMI, CORBA, JNDI, Swing, AWT, JavaMail, JAF, JIMI.</p> <p>Communication languages: XML/XSL, HTML/DHTML, JavaScript 1.3 and higher</p> <p>System Architect tools : Rational Rose</p> <p>Methodology: RUP</p>
Main clients	2002 – USA, Canada; 2003 – USA, Canada, UK, Ukraine
Development priorities	Marketing, PR and partnership establishing in North America and Western Europe
Projects	Mantix Media (Canada), The WWWS (USA), Ley Lines (UK), Copywriter UK, Nissan Ukraine, Minolta Ukraine.



Company name	Softline
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Phone/Fax	+380 (44) 451 9225 / +380 (44) 573 2806
Company director	Anton Marrero / anton@softline.kiev.ua
Offshore software development director	Yuriy Sivitsky / yuriy.sivitsky@softline.kiev.ua
Year of foundation, the year offshore development was started	1995, 1997
Certification	1997: ISO 9000-3, ISO 9001 2003: ISO 9001:2000
Founder	JSC: top management + investment fund
Business model	Customized software development
Staff number	More than 350 employees
Services	Services: software applications development and support, reengineering and reconstruction of legacy systems, IT consulting, business consulting Specialization: software applications for financial and operational management, accounting and billing, workflow and document flow, Internet/Intranet
Development tools used	Languages: C/C++, C#, Java, Javascript, Delphi, Visual Basic, Vbscript, SQL, PL/SQL, SPL, T-SQL, XML, XSL, HTML, DHTML, CFML, PHP Tools: Rational, Microsoft, Borland/Inprise, SUN, Macromedia, Open Source Methodology: RUP, UML Platform: Windows, Unix, Linux
Main clients	USA, Switzerland, Ukraine
Development Priorities	Marketing and PR abroad, opening international representatives; improvement of software development technologies, project management and quality assurance, certification; new business activities development
International Representatives	<u>USA:</u> Volia Software 123 N. Post Oak Ln., Suite 410 Houston, Texas 77024, USA Phone: +1 (713) 980 9815 Fax: +1 (713) 621 4666 www.volia-software.com <u>UK, France, Italy, Switzerland:</u> SoftXtreme Route des Arsenaux 9 P.O. Box 1449 CH-1701 Fribourg, Switzerland Phone: +41 (0) 26 3505 290 Fax: +41 (0) 26 3505 291 www.softxtreme.com



Company name	Source Valley
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Address	10 Shovkovichna Str., of.10, Kiev, Ukraine
Phone / Fax	+38 044 253-0269 / +38 044 253-4775
Company director	Roman Khmil/rkhmil@sourcevalley.com
Offshore software development director	Vladislav Petrenko/vpetrenko@sourcevalley.com
Year of foundation, the year offshore development was started	2002, 2003
Certification	CMM compliant; formal certification planned in 2004-2005
Founder	Ukrainian founders
Business model	Project based (testing, maintenance, support) Broker (software development)
Staff number	Production staff – 15 persons (Project Managers – 2) Management staff - 2
Services	Full spectrum of independent testing and quality assurance services: tests development, static, functional, performance, functional, regression testing, test automation, software tuning and optimization Maintenance, support, call centers, help-desk Broker of software development projects
Development tools used	Test tools: Mercury Suite (QTP, Win/Load Runner, Test Director), Seque Silk Suite, Rational Rose Suite, ParaSoft JTest, E-Test Suite, OpenSTA, JMeter Bug Tracking: Bugzilla, Test Director, Star Team, OnTrac, Track Record, PR-Tracker, Team Track, MS Outlook/Lotus Notes
Customers	2003 – USA, Canada
Development priorities	Search for the new clients Marketing & PR for Western region Formal CMM certification



Company name	TeT Co. Ltd
Web-site:	www.tet.com.ua
E-mail:	tet@tet.com.ua
Address:	17 Ekaterininskaya Street, Odessa, 65026, Ukraine
Mailing address	P.O. Box 57, Odessa-11, 65011, Ukraine
Telephone/fax:	380 (48) 777-9728 / 380 (48) 777-5056
Company director	Alexander Tkachev a_tkachev@tet.com.ua
Offshore software development director	Alexander Tkachev a_tkachev@tet.com.ua
Year of foundation, the year off-shore development was started	1992, 1996
Certification	No (SEI CMM Level 3 – compatible process)
Founders	Citizens of Ukraine
Staff number	Software developers – 20 pers. Project Managers – 3 pers. SPEG/QA – 3 pers.
Services	Custom software development (software consulting), IT Consulting, Business analysis
Specialization	eCommerce Applications, Business to Business Solutions, Customer Relationship, Management, Data Warehousing and Business, Data Analysis Applications, Document and Knowledge Management.
Development tools used	PLATFORMS: - MS Windows (NT/2000/XP/ME) - Handheld Computing platforms DBMS: - ORACLE - MS SQL Server LANGUAGES AND ENVIRONMENTS: - Microsft.NET, C#, C/C++, VB.NET, ASP.NET, VB 6.0 - WebServices, XML, XSLT and related technologies - PHP, Perl - ColdFusion, CFML
Main clients	Isogon Corp. (NY, USA) – since 1997, ADS Corp. (NJ, USA) – since 2000
Development priorities	Major priority – controllable grows of the software consulting business (not more than 70% per year). Additionally – developing business analysis and ASP services.
Projects	About 20 successfully completed projects from 1500 man hours to 12 man years in scale. No failed projects.

ESP

The Elite Software Products (eSP) is an international Consortium of top-quality Ukrainian and American software development and hi-tech companies. We are located in Kharkiv, Ukraine and Silver Spring, Maryland, USA and specialize in outsourced software development.

In carrying out our clients' projects, we emphasize constant communication with the client and seek their approval and input as the project proceeds. We provide full-service software development – from detailing project parameters to testing and quality assurance. We utilize state-of-the-art software and project management tools for the development of our products; the results have been excellent.

The structure of our company has been designed in a way that maximizes benefits for customer:

- The customer can adjust all of the terms of the contract with the central office of Consortium;
- The Consortium's management shall solve the customer's problems maximize the Consortium's resources for the clients benefit;
- By utilizing skilled software specialists from Eastern Europe (with a strong background in programming for the space industry in the former Soviet Union), significant cost savings are passed on to the customer without compromising quality;
- Fulfillment of the customer's requirements, terms of contract, and quality specs shall be ensured by the well qualified management of the Consortium.

Our team consists of about 200 high-professional specialists in the following areas:

- Software Development;
- System Integration and Maintenance;
- Quality Standards;
- IT- Consulting and Training.

Our skills include:

Platforms	IBM PC, SUN, RISC 6000, AS/400, IBM 370 (IBM S/390, EC9000)
Operating systems	Windows XP/2000, Windows NT, Windows 9x, Unix (SunOS, Linux, AIX, SCO, BSD), OS/2, OS/400, DOS
DBMS	Oracle, MS SQL, MySQL, Sybase, DB2, FoxPro, Paradox, MS Access, Xbase, Clipper, ADABAS/NATURAL, Db Vista
Languages	C/C ++, Visual Basic, Java, Perl, SQL, Assembler, COBOL, RPG, PL/1, Fortran, Pascal/Object Pascal, PHP, HTML, XML, JavaScript
IDEs/Compilers	Microsoft Visual Studio Enterprise (Visual C++, Visual Basic, Visual Java), Borland C++ Builder, Borland C++ Delphi, Sun Workshop C++, G++, IBM Visual AGE 3.5, Java SDK, ActivePerl
Real-time OS	RTKernel, QNX, VxWORKS, LynxOS
Network protocols	TCP/IP, IPX/SPX, SNA

We believe that all the ingredients for a successful venture are here:

- a ready pool of Software Development talents;
- experienced management skilled in large project implementation;
- new talent trained to IT specifications by the educational institutions;
- low cost, excellent value;
- government support with tax incentives;
- a successful track record.

Additional information on the Elite Software Products (eSP) Consortium can be obtained on its web site:

<http://www.elite-sp.com/>.

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URL: <http://www.elite-sp.com/>

UASWD



The Ukrainian Association of Software Developers (UASWD), registered on June 8, 1999 as a non-profit, non-governmental public organization, unites a number of Ukrainian leading software houses.

UASWD is an international public organization, established to create favorable conditions for the progressive growth of the software development industry in Ukraine. To achieve this goal, the Association will promote political and other programs aiming at the improvement of technologies and ensuring the growth of market for their members and the Ukrainian industry of software development in general, economic growth and the increase of the number of jobs in Ukraine.

Goals and objectives of UASWD

The main activity of the Association lies in the satisfaction and protection of their legal social, economic, creative, national and cultural and other common interests as well as the assistance in the forming of legal, technical, economic, political culture in Ukrainian society.

The main objectives of the Association are:

- forming of a civilized market of software development in Ukraine, struggle for software certification, anti-pirate campaign;
- cooperation with legislative and executive bodies of the governmental authorities in the issues of elaboration and passage of legislative and standard bases, regulating software market in Ukraine;
- assistance in the activities of the governmental and public organizations and the members concerned with the development of high technologies, development, production and sale of computer software in Ukraine and abroad;
- assistance in increasing the personnel level of the Ukrainian software development industry, decreasing the flow-out of human intellectual resources from Ukraine, creating new jobs, training and preparation centers of engineering and scientific manpower;

As of October, 2003, UASWD collective members are:

IDM Ltd., Information Systems Development (ISD) (Dnipropetrovsk), Source Valley, SputnikMedia.Net, International Land Systems Ukraine (ILS-Ukraine), Kvazar-Micro, Komizdat, Microcosmic Group, SoftPress, SoftServ (Lviv), Telesense Ukraine (Kharkiv), Tessart, Elex (Lviv).

Two Ukrainian largest publishing houses SoftPress and Komizdat are UASWD permanent media partners.

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E-mail: victor_spiridonov@uaswd.org.ua
Website: <http://www.uaswd.org.ua>

Ukrainian Software Consortium



Description of Organization:

The Ukrainian Software Consortium acts as a gateway for a network of pre-selected software development companies with a wide scale of competencies and strong experience in serving international businesses. As a technology partnership provider, we assist our international customers in finding, evaluating, and building secure cooperation with Ukrainian IT companies. We also work to minimize cooperation risks with our risk management model, involving anti-lock-in with vendor, reputation tracking, and legal support and financial guarantees on projects.

Today the Ukrainian Software Consortium involves 22 IT companies, many of which have certified development and quality assurance processes. Its member companies have accumulated extensive experience in completing mission-critical projects for Soviet military and aerospace in the in the past as well as for respected international global customers including Delta Air Lines, ING Bank, RaboBank, IFC, GAF, LizardTech, Deutsche Telekom, France Telecom and others.

IT Companies selection criteria

Criteria	Facts
Strong experience in offshore programming and other types of IT export	Project leaders of USC member companies have at least 7 years in managing international software projects.
References from recognized international customers	Upon your request we will provide references from internationally recognised customers.
Strong management capacity in project execution according to international industry recognized standards and methodologies	Compliance with industry standards in project (RUP, DSDM) and quality (CMM, ISO 90301) management.
Good language capacity and cultural compatibility	100% of project leaders and 70 % of staff are English-speaking, 30% of project leaders are French-speaking, and 20% are German-speaking. They have strong experience in working within multicultural environments and implementing projects for US, European, and Asian customers.
Cost-effectiveness and competitive pricing (in comparison with Russia, Baltic and other Eastern European Countries)	Ukrainian software developments per hour rates are 25-50% cheaper than Russian and Baltic. After joining the EU, Baltic countries will lose their cost advantages due to strict tax regulations. Prices of contracts with USC will not exceed prices of direct contracts with customers.
Own portfolio of innovations, high R&D potential	Over 40 PhDs and 15 Professors in USC companies staff, close connections with academia.
Good market reputation and transparency	All USC participants took part in the first International research of Ukrainian IT-export industry by Market-Visio(Gartner Group). Participation in industry associations (The Ukrainian Association of Software Developers, The Ukrainian Hi-Tech Initiative,) and business alliances USC and eSP Consortiums.

Competence

To ensure competent advice and the best vendor selection, as well as an optimal cooperation model, we structure business in the form of verticals- and technology-focused competence centers. The competence centers model is intended to best integrate development capacity, expertise, and academic resources by forming marketable clusters of technology vendors. Coordinated by managers with strong industry experience, our competence centers provide a pool of vendors and skills, suiting the majority of corporate IT needs. It also gives our customers flexibility in cooperation models .

Currently we've established competence centers in the following areas:

- *Corporate solutions and business process automation*
- *Games and multimedia*
- *GIS and Remote Sensing*
- *Information security systems*
- *Internet-solutions*
- *Legacy applications services*
- *System Programming and embedded solutions*

The USC and its vendor network deliver a wide range of services and custom-tailored products for a variety of customers in such industries as:

- *Aerospace*
- *Banking and finance*
- *Education*
- *Machine-building & manufacturing*
- *Micro-electronics*
- *Multimedia*
- *Retail*
- *Telecommunications*
- *Transportation*

Services of Ukrainian Software Consortium

Directly delivered by USC Business Center	Delivered by our Development Centers
<ul style="list-style-type: none"> ▪ Vendor evaluation and selection ▪ Project management offices for complex projects ▪ Consulting on and creating offshore development centers ▪ Technology commercialization and consulting ▪ Access to our database of pre-selected technology opportunities from Ukraine (for investors) ▪ Legal support for contracts ▪ Financial guarantees for contracts ▪ Development clusters set-up for complex project ▪ Market research and advice 	<ul style="list-style-type: none"> ▪ Custom software development ▪ IT systems reengineering and integration ▪ IT Systems Support ▪ Quality assurance outsourcing for software development process ▪ Remote administration ▪ IT-enabled Business Process Outsourcing (BPO) ▪ Out-staffing (offshore staff for IT departments)

Contact: Mr. Serhiy Loboyko

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Ukrainian HI-TECH Initiative

Ukrainian Hi-Tech Initiative

About Ukrainian Hi-Tech Initiative		
Finport Technologies www.finporttechnologies.com	Kiev	<p>Ukrainian Hi-Tech Initiative, an outsourcing alliance of Ukrainian companies operating in the field of software development (http://www.hi-tech.org.ua).</p> <p>Presently, our alliance consists of 15 private companies from Kiev, Kharkov and Dnepropetrovsk, which have contracts with foreign companies that outsource software development. And the number of members is rapidly increasing.</p> <p>The main purpose of the association is to:</p> <ul style="list-style-type: none"> • consolidate Ukrainian software business • jointly promote the Ukrainian software brand to foreign markets • jointly work at complex technological projects. <p>The range of problems addressed and solutions provided by the member companies is quite broad – starting from the design of web-sites to participating in Delta Air Lines projects on development of navigation systems and management of spacecrafts.</p> <p>Additionally, we have also carried out a number of joint undertakings aimed at raising the level of expertise of our member companies to the level of world markets in software development.</p> <p>We are interested in getting contacts with software consulting companies as well as with end customers that are interested in outsourcing some of their software developments activities to Ukrainian software developers. Our aim is to optimize time and financial resources for the realization of software projects.</p> <p>Victor Maznyuk, Coordinator Ukrainian Hi-Tech Initiative</p> <p>Post Office Box 18 03068 Kiev, Ukraine mail: maznyuk@hi-tech.org.ua www: www.hi-tech.org.ua</p>
KP VTI www.kpyti.kiev.ua/	Kiev	
Novatek www.novatek.kiev.ua	Kiev	
Program Development Systems www.manager-erp.com	Kiev	
Tessart www.tessart.com	Kiev	
Vimas Technologies www.vimas.com	Kiev	
Logis www.logis-pro.com	Kiev	
Center network technologies WEB100 www.web100.com.ua	Kiev	
KIT Group www.kit-group.com.ua	Kharkov	
NIX Solutions www.nixsolutions.com	Kharkov	
SoftPro Workgroup www.wgsoftpro.com	Kharkov	
Technology and medicine www.medtim.com	Kharkov	
FOSS-On-Line www.foss.kharkov.ua	Kharkov	
BeeSoft's www.beesoft.com.ua	Dnepropetrovsk	
ZStyleGroup www.zstyle.dp.ua	Dnepropetrovsk	

4.3. Research participants

Company name:	General Director:	Web-site:
ABF Software Inc.	Karpenko Anton	www.abf-software.com
ABT Solutions	Chebotař Aurelian	www.abtsolutions.net
Abyss Lights Studio	Zhukov Evgeny	www.abyss-lights.com
ALTA Eastern Europe	Shymkiv Dmitry	www.alta.net
ATRIA Ukraine	Goncharov Alexander	www.atria.kiev.ua
Automatic Systems & Technologies	Tverdohleb Alexander	www.autosystems.com.ua
BeeSoft	Ripp Ludmila	www.beesoft.com.ua
CODEWIND	Bilanovskiy Vladimir	www.codewind.com
Community8	Mihalko Vladimir	www.community8.com
CINTECH	Kushnir Dmitry	www.cintech.kiev.ua
CS Ltd.	Babchenko Igor	www.scltd.com.ua
Eclipse Software Programming LLC	Lysenko Dmitry	www.eclipse-sp.com
ELEKS Software	Skrypnik Alexey	www.eleks.biz
EnTechEco	Zubenko Andrey	www.entecheco.com , www.offshore.entecheco.com
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Exodus Studio	Borshevskiy Egor	www.exodus.com.ua
Finport Technologies Inc.	Baranov Vladislav	www.finporttechnologies.com , www.webobserver.info
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Infopulse Ukraine	Sigov Alexey	www.infopulse.kiev.ua
Information Technologies	Sherbatenko Oleg	www.it.ua
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Korzh.com	Korzh Sergey	www.korzh.com
KP VTI	Bud'ko Nikolay	www.kpvti.kiev.ua
LOGIS	Mesyats Sergey	www.logis-pro.com
MBS	Alexeev Maxim	mbs.kharkov.com , mbs-ukraine.com
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Pimentos	Perets Jury	www.pimentos.com.ua

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SoftFund	Feigin A.	www.sfund.kiev.ua
SoftLine	Marrero Anton	www.softline.kiev.ua
SoftServe Inc.	Kytsmey Taras	www.softservecom.com
Softwarium	Neverodskiy Petr	www.softwarium.net
Source Valley	Khmil Roman	www.sourcevalley.com
Technocom AT Ltd.	Dubrovskiy Sergey	www.techno-at.kiev.ua
Telesens KSCL Ukraine Ltd.	Rubin Eduard	www.telesenskscl.com.ua
Tessart	Beloded Vladimir	www.tessart.com
The KIT Group	Shevchenko Jury	www.kit-group.com
Ukrainian Chamber of Science and Technology	Anchizhkin Dmitry	www.ukrtex.com.ua
UNA	Kozyarevich Dmitry	www.una.com.ua
UPT	Perekupka Vitaly	www.uptsoft.com
VIMAS Technologies	Maksakov Andrey	www.vimas.com
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WG SoftPro	Karnozhitskiy Alexey	www.wgsoftpro.com
ZstyleGroup Ltd.	Zabegailo Sergey	www.zstyle.dp.ua