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DIGITAL TECHNOLOGY

ITALIAN MARKET TREND - IQ 2009

Milan, 3 June 2009 – SIRMI SPA has issued the first quarter 2009 analysis of the Digital Technology Market in Italy, with details relative to PC, Server and Storage.

The ICT market for the first quarter of 2009 decreased 2,3% over the same quarter last year, while the IT market declined 5,7% and TLC 0,3%.

The Consumer Electronics market showed the worst performance, with a drop of 6,8%.

ITALIAN ICT Market - IQ 2009

	IQ 2008		IQ 2009	
	End User Expense	Variation over previous year	End User Expense	Variation over previous year
	Millions Euro	%	Millions Euro	%
Hardware	2.287,7	2,0%	2.160,7	-5,6%
Software	1.078,6	4,2%	1.029,6	-4,5%
Development Services	1.149,5	3,1%	1.061,1	-7,7%
Management Services	1.457,2	1,6%	1.379,1	-5,4%
Total IT	**5.973,0**	**2,5%**	**5.630,5**	**-5,7%**
PC specific sector	1.013,5	-0,6%	981,3	-3,2%
TLC fixed	4.778,8	0,2%	4.705,4	-1,5%
TLC mobile	5.472,6	-0,6%	5.520,0	0,9%
Total TLC	**10.251,4**	**-0,2%**	**10.225,4**	**-0,3%**
Total ICT	**16.224,4**	**0,8%**	**15.855,9**	**-2,3%**
Total Consumer Electronics	**2.213,3**	**7,1%**	**2.062,8**	**-6,8%**

Source: SIRMI SPA – April 2009

The PC Client market increased in the first quarter 2009 by 25,9% in shipments and 2,5% in revenues compared to the first quarter 2008. The growth has been driven by Notebooks (for business and consumer users) and by Netbooks which have showed large volumes in shipments since their first entrance in the market.

ITALIAN PC CLIENT MARKET – IQ 2009

	Shipments	Variation over previous year	Sales	Variation over previous year
	Units	%	Millions Euro	%
Consumer Notebook	442.000	17,9%	208,6	0,4%
Business Notebook	458.000	23,2%	314,7	6,3%
Netbook - Mini Notebook	295.000	ns	78,8	ns
Consumer Desktop	180.000	-15,5%	77,5	-26,4%
Business Desktop	301.000	-13,5%	154,2	-22,7%
Thin Client	6.200	-31,9%	1,0	-33,8%

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Total PC	**1.682.200**	**25,9%**	**834,8**	**2,5%**
Total PC excluding Netbook	**1.387.200**	**5,4%**	**756,0**	**-6,7%**

Source: SIRMI SPA – April 2009

The Server Market (Systems, Workstation e PC Server) showed a negative trend of all its components in the first quarter of 2009 over the same quarter of 2008. The lines of products that have decreased the most are PC Servers, with a decrease of 28% in volume and 34,2% in revenue, and Personal Workstations, with a decrease of 27,3% in volume and 34,9% in revenue.

ITALIAN SERVER MARKET – IQ 2009

	Shipments	Variation over previous year	Sales	Variation over previous year
	Units	%	Millions Euro	%
Systems Unix and Proprietary	1.730	-7,7%	60,6	-9,8%
Server Intel/AMD high band	233	-8,6%	6,3	-11%
PC Server	34.500	-28,0%	86,8	-34,2%
Total Server	**36.463**	**-27,1%**	**153,7**	**-25,5%**
Workstation Risc - Unix	255	-4,0%	1,1	-8,0%
Personal Workstation	7.850	-27,3%	16,7	-34,9%
Total Workstation	**8.105**	**-26,8%**	**17,8**	**-33,7%**

Source: SIRMI SPA – April 2009

Also **the Storage market** showed a decline of all its components in the first quarter 2009 compared to the same quarter last year.

ITALIAN STORAGE MARKET - IQ 2009

	Revenue	Variation over previous year	Share
	Millions of Euro	%	%
On Line Low band	29,1	-12,3%	33,6%
On Line High band	33,8	-12,2%	39,0%
Unit Enterprise for MF/OS	4,5	-29,4%	5,2%
Unit Tape automated	10,0	-14,5%	11,5%
Unit Autoloader/Single Tape	8,0	-7,0%	9,2%
Juke Box/Worm	1,2	-20,0%	1,4%
Total Hardware	**86,6**	**-13,3%**	**100,0%**
Total Software	**44,2**	**-7,9%**	

Source SIRMI SPA – April 2009

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SIRMI provides Operative and Strategic Consulting as well as Market Research & Analysis, Marketing Plans Design & Implementation in the Italian ICT Market. Since 1976 SIRMI monitors and analyses the Italian ICT market, supporting Vendors, Channels and generally ITC Operators being successful in the Business Evolution from Products to Solutions Suppliers, from End User Markets to Distribution Channels. In more than 30 years of activity, SIRMI acquired an extraordinary and exclusive heritage of knowledge, information, skills and experience and is today known as one of the most reliable source for the Italian ITC Market. Among its customers SIRMI acknowledges the majority of the Italian Market ICT and TLC players, as well as the primary End User Enterprises in the private and public sector