

Press Release

DIGITAL TECHNOLOGY ITALIAN MARKET TREND - IQ 2010

Milan, 24 May 2010 – SIRMI SPA has issued its analysis on the Digital Technology Market for the first quarter of 2010. The market registers a growth near to zero in comparison with the same period of last year but with the first sign of a recovery. Here below, a summary of the analysis:

ITALIAN ICT Market - IQ 2010

	IQ 2009		IQ 2010	
	End User Expense	Variation over previous year	End User Expense	Variation over previous year
	Millions Euro	%	Millions Euro	%
Hardware	2.100,9	-8,0%	2.079,5	-1,0%
Software	1.029,6	-4,5%	1.054,0	2,4%
Development Services	1.061,1	-7,7%	1.015,2	-4,3%
Management Services	1.379,1	-5,4%	1.387,4	0,6%
Total IT	5.570,7	-6,7%	5.536,1	-0,6%
PC specific sector	922,0	-6,1%	916,0	-0,7%
TLC fixed	4.531,0	-3,4%	4.501,6	-0,6%
TLC mobile	5.504,8	-1,8%	5.565,1	1,1%
Total TLC	10.035,8	-2,5%	10.066,7	0,3%
Total ICT	15.606,5	-4,1%	15.602,8	0,0%
Total Consumer Electronics	2.062,8	-7,3%	2.032,6	-1,5%

Source: SIRMI SPA – April 2010

The End User expense in IT products and services registers a value of 5.536 millions euro in the IQ 2010, with a decrease of 0,6% over the same period of last year.

Almost all segments of **Hardware** offer show a decrease of expense but also a slowdown of the decreasing trend, in comparison with the same period of last year.

Software end user expenses increase by 2,4% in IQ 2010 over last year. All the three market segments increase: System software (+2%), Middleware and Tools (+3,7%) and Application (+0,6%).

IT Services register a decrease by 1,5% over IQ 2009: this is the result of a further decrease of the expenses in development services (-4,3%) and of the flat trend of management services (+0,6%).

Also **TLC** market show a flat trend in terms of expenses in comparison with the same period of 2009 (+0,3%) with a final value of 10.066 millions of euro. In particular, TLC mobile increase by more than 1% while TLC fixed decrease by 0,6%.

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ITALIAN PC CLIENT MARKET – IQ 2010

	Deliveries	Variation over previous year	Sales	Variation over previous year
	Units	%	Millions Euro	%
Consumer Desktop	184.550	3,1%	68,7	1,1%
Business Desktop	338.400	14,5%	122,4	0,5%
Total Desktop	522.950	10,2%	191,1	0,7%
Consumer Notebook	570.100	27,1%	248,4	17,1%
Business Notebook	345.200	-24,7%	227,4	-23,5%
Total Notebook	915.300	0,9%	475,8	-6,6%
Netbook	443.800	50,4%	101,2	31,4%
Total PC Client	1.882.050	12,2%	768,1	-0,7

Source: SIRMI SPA – April 2010

PC Client Italian market turnover is steady (-0,7%) in comparison with the IQ 2009 while the units delivered increase by 12,2%.

In detail, **Desktops** register a recover in IQ 2010 both in sales and units delivered. **Netbooks** register the most important result (+31,4% in sales and +50,4% in units) along with **Notebooks Consumer** (+17,1% in sales and +27,1% in units). Opposite trend for **Business Notebook** that decrease by -23,5% in terms of turnover and by -24,7% in terms of units sold.

ITALIAN MIDRANGE MARKET – IQ 2010

	Deliveries	Variation over previous year	Sales	Variation over previous year
	Units	%	Millions Euro	%
Systems Unix and Proprietary	1.516	-1,0%	54,5	-3,3%
Server Intel/AMD high band	186	-15,8%	4,9	-17,8%
PC Server	37.210	8,0%	90,3	7,1%
Systems Offer	38.912	7,5%	149,7	2,1%
Workstation Risc - Unix	195	-4,9%	0,8	-10,9%
Personal Workstation	8.950	16,5%	19,2	17,1%
Workstation	9.145	16,0%	20,0	15,6%

Source: SIRMI SPA – April 2010

Systems Unix and Proprietary maintain the same decreasing trend of last year in turnover and volumes.

Servers with **Intel/AMD** architecture show in IQ 2010 a very negative trend, in particular concerning sales (-17,8%).

PC Servers standard register an opposite trend: after a difficult 2009, it show a positive trend: sales increase by 7,1% and units sold increase by 8%.

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ITALIAN STORAGE MARKET - IQ 2010

	Turnover	Variation over previous year	Quota
	Millions of Euro	%	%
On Line Low band	31,00	12,7%	32,9%
On Line High band	40,85	15,7%	43,3%
Unit Enterprise for MF/OS	4,40	-2,7%	4,7%
Unit Tape automated	9,00	-9,1%	9,5%
Unit Autoloader/Single Tape	7,60	-5,0%	8,1%
Juke Box/Worm	1,41	-21,7%	1,5%
Total Hardware	94,26	8,3%	100,0%
Total Software	46,70	3,7%	

Source: SIRMI SPA – April 2010

Storage market registers a positive trend in IQ 2010 (+8,3% over IQ 2009), thanks to high performance of lines of products of medium line addressed to Medium Enterprise or solutions for specific sectors of Large Enterprise.

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SIRMI provides Operative and Strategic Consulting as well as Market Research & Analysis, Marketing Plans Design & Implementation in 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