



Peruvian Computer Market Report 2008 and Perspectives 2009

This report is the result of the analysis that Dominio performs of the Peruvian information technologies market. The objective of this report is to show the market analysis, in aggregated figures, at the end of 2008 as well as the perspectives and projections of said market for the next annual period.

In order to elaborate this report, all the compiled information is used by Dominio during the present year, all the market research in various segments, all the reports, each performed analysis and the market appreciation of the enterprise analysts group.

It is important to highlight that the report consists of two similar editions. The first we edited and published in November in order to help with the next year's enterprise planning. This edition includes figures according to how our consultancy estimates the year will end. The second edition is published in the first weeks of February, as long as the actual figures show significant changes (approximately 5%) that could alter our client's objectives based on the figures shown in the first edition. The report cost includes both editions.

The certainty of our information data is based on primary and secondary sources such as users, manufacturers and distribution channel. Here follows the summary of the points that are discussed on this report.

Consultants' opinion

The analysis and opinion of the consultants' team about the market reality and perspectives are shown as an executive summary. Main strengths and weaknesses of the market, as well as the opportunities and risks, are indicated.

Short description of the Peruvian economy

Main indicators of the Peruvian economy are shown as an executive summary. Furthermore, we propose the challenges of the industry against the possible effects of the international crisis to our country.

Information technologies market size

It shows the market size expressed as the value (in USD) of the products and services acquired by the final users, without including taxes. The information is subdivided in three general categories: hardware, software and services.

Hardware category includes the following disaggregated components:

Computers	Desktops, laptops, terminals, PDA, PDT, POS, PC servers (Intel / x86), no PC servers (not Intel / not x86 / Unix), Smartphones.
Printing	Dot matrix printer, inkjet, laser, POS/thermal, multifunction, plotters.
Networking	Routers, Switches, Hubs, NIC, others.
Storage	DAS, NAS, SAN
Other peripherals	Monitors, scanners audio and video, other input devices (keyboard, mouse).
Interface	Video, sound
Components	Cases, power sources, memories, processors, hard drive, Main boards, Barebones, CD / DVD drivers / readers / burners.
Others	Other hardware devices.



The software category includes the following disaggregated categories

System software	Operating systems, office applications, development and report applications, communication and collaboration communications, application servers, business intelligence tools, RDBMS/DBMS, management applications
Applications	ERP/business management, CRM, SCM/logistics/MRP/operations, security, storage, portals, electronic commerce, workflow, knowledge management, document management, content management, others.

The service category includes the following disaggregated categories

Services	Consultancy and IT planning, system integration, application development, installation and implementation of new software, maintenance/support/technical support, leasing, data centre, communications, management, security, disaster recovery/business continuity, processing, digitalization / document / content management.
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Analysis by market segments

Analysis and perspectives of each one of the six market segments that Dominio systematically analyses, by volume of invoicing: corporative (incomes of more than USD 100K), big organizations (incomes between USD 40 and USD 100K), medium (incomes between USD 1 and 40K), small ones (incomes between USD 0.2 and 1K), government and homes.

Analysis by industries

Despite the fact that Peru does not have any vertical industries yet that gather an important number of enterprises, this analysis is performed to be used as a reference by the reader on which industries have the best growth development and according to the case, allow to compare the tendency with other countries.

Computer market

It includes the installed base, importations and sale of desktops (brand and assembled), laptops, PDA, PDT, PC servers (Intel /x86), Not PC Servers (not Intel/not x86/Unix) regarding the whole market, measured in units. Also, it includes market participation for each one of these categories.

Print market

It includes the installed base, importations and sale of dot matrix printers, inkjet, laser, POS/thermal, multifunction regarding the total market, measured in units. Also, it includes the participation of the market for each one of these categories.

Networking market

It includes the installed base, importations and sale of routers, switches and wireless access point regarding the whole market, measured in units. Also, it includes the participation of the market for each one of these categories.

Global tendencies of the computer industry

Analysis of the main tendencies that are changing in the world and that can affect the development of the industry in our country.



Perspectives about the development of the Peruvian market and the adoption of technologies

Analysis of the main tendencies that are changing the dynamics of the Peruvian information technologies market and that will make a future impact regarding all categories.

E-Commerce

Projection of the quantity of Internet users in Peru, population penetration of Internet and infrastructure of access to Internet in Peru. Public Internet access. Access to Internet.

Distribution channel

Analysis of the favourable and unfavourable aspects related to the distribution channel, description and analysis of the wholesale channel and evolution of the sales for each wholesaler, description and analysis of the retailer channel and analysis of the main ones. Also, an analysis for each agent category in the retailer channel and the perspectives of each type of enterprise will be developed (Integrator/VAR, Consultants, Dealers, Retails, and Manufacturers).

Vendors who operate in Peru

Description and analysis of vendors who operate in Peru, of the market that they serve, of their strategies and the effectiveness of them related to the opinion of our analysts.

Glossary

Definitions that are used and applied to perform this report.