

Italien



Market data



GDP	1.531 bn € (2009)
Growth	1,2 % (exp. 2010)
Population	60,4m (01/2010)
ICT Invest.	71 bn. €
Ranking	4 th place in the major IT markets
Reseller number	> 6000

Source: gtai, EITO, Compubase



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Italy: also interesting from the economic point of view

Similar to other markets, the Italian market suffered from the problems in the years 2008/2009. Growth dropped to - 5 %. But already in 2010 the market performance is significantly more positive with a growth of 1.2 %. Thanks to its diversification and strong integration in Europe, Italy has been able to acquit itself well. 43.7 % of goods and service are sold to countries in the EU. Furthermore Italy is one of the most important commercial partners of Germany: 16.7 % of the total imports come from Germany, which is the largest single value among the supplying countries. (source: gtai)

The Italian ICT market

Italy has got one of the most interesting ICT markets in Central Europe. Based on a survey by Assintel (Italian branch association), the IT rate (hardware, software and service) from the total ICT sales was approximately 21 bn. Euro in 2009. About 2.1 bn. Euro alone account for software investments. Market access is well feasible with partners, because approx 6,000 resellers in the IT market offer good access to over 146,000 final customers.

Geographic disposition

Italy is distinctively divided into regions, which also present diverse key activities. The largest proportion of companies (39 %) is situated in the northwest (Lombardy, Piemonte). Another 26 % in the northeast (Veneto, Trentino). This means that more than 65 % and consequently 95,000 companies are situated in Northern-Italy. (source: Assintel 2009)

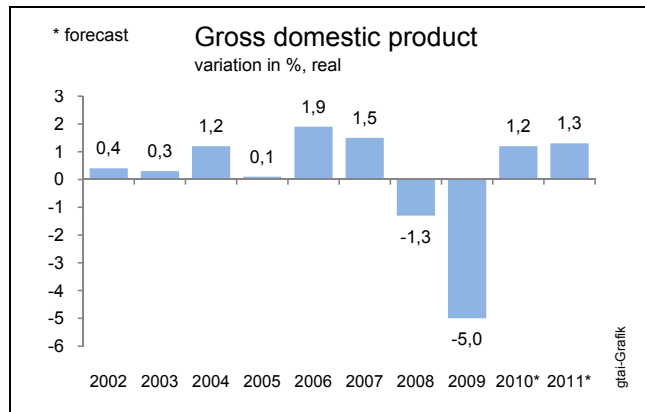
Company structures

Italian companies tend to be small companies. Approx. 115,000 companies have 1 to 20 employees investing about 8 bn. € in ICT. A further 22,000 companies have 20-100 employees investing approx. 15 %, thus approx. 10 bn. €. The main sales in the ICT sector is generated by companies with more than 500 employees. The Italian market accounts for about 50 % here, meaning 35 bn. € in ICT sales. (source: Assintel 2009)

ICT trends

The large number of resellers and service companies is confronted with a small number of software producers.

About 1,200 companies deal the development of innovative SW solutions. Trends like mobile computing and cloud were identified early, which if nothing else is encouraged by low infrastructural costs (telephone and Internet fees). This trend is emphasised in a survey by Assintel, showing that 10-20 % of the questioned companies want to invest in issues such as portals, web services, BPM in the coming years (source: compubase, Assintel)



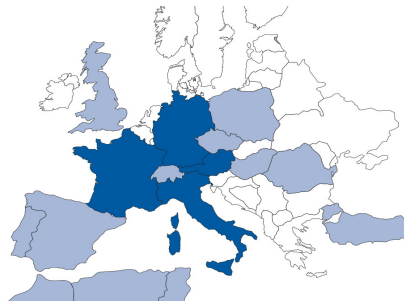
Interesting IT issues - ERP, CRM, DMS

Modern and innovative solutions are the key to success in the Italian market. According to a survey among 500 IT managers in 2009, more than 50 % of the companies want to invest in modern ERP solutions. The same number is considering CRM solutions and hardly 50 % declare a considerable need in DMS/ECM solutions. (source: Assintel)

Conclusion:

There are investments in Italy and partners provide efficient market access.

Germany	France	Italy	United Kingdom	Austria	Portugal	Hungary	Czech Republic
Switzerland	Spain	Rumania	Poland	Turkey	Tunisia	Marocco	Algeria



Performance requirements

We act as interim managers for our customers, carrying out the task of **partner recruiting for a specific time**. Of course we contribute our experience and market knowledge within the frame of our activity in **product** and **partner marketing**. The **partner management** is up to our customers. If required we carry it out for a defined period.

How do we proceed?

In a workshop we examine your partner communication and your concept together with you and the recruiting people. Eventually we develop the partner profile together, which shall be used for the first communication in the market. We evaluate your partner contract and your partner concept with the target of initiating successful (strong-selling) partnerships as efficiently as possible.

What does partner recruiting mean to us?

Especially in culturally foreign markets or in other sectors it is an advantage to assign a service company such as IIC with the communication with a potential partner. On the basis of the defined partner profile we identify reasonably suitable partners and consequently communicate directly with the market players in the target market you would like to enter.

As soon as it is about foreign markets, we make use of **our colleagues on the spot**, who carry out **business development** for you on the basis of their many years of knowledge of the market and the market players as well as language and sales competence. We always act as IIC and so represent the neutral **technically sound consultant** for potential partners, with the concept for “sales”.

The advantages of IIC !

We are repeatedly asked about the advantages of IIC compared with own resources:

- Our only job is partner recruiting and this is the reason for a broad wealth of experience
- We utilise existing contacts and expand our network continuously by research
- We use synergies from communication
- We can speak with the competitors' partners without problems
- Our activities are basically limited in time (the first step up to 6 months)
- We also participate in success and thus depend on achieving it,
- ...

The concept

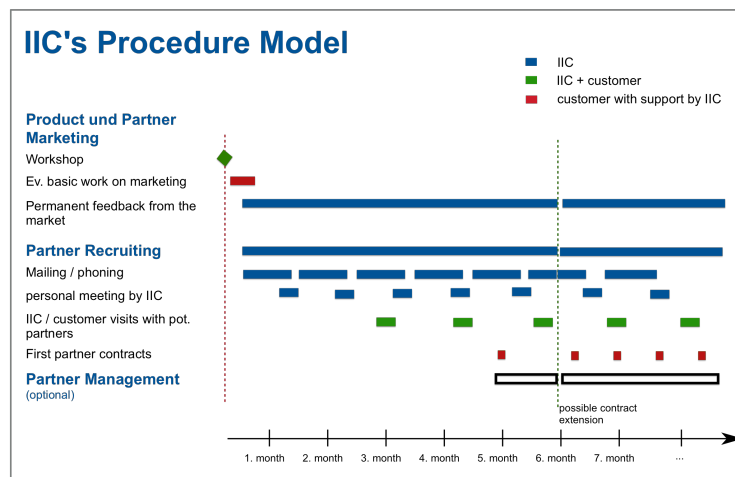
As neutral consultants we are organised in a “recruiting project” together with you, which is subject to the rules of project business (regular reporting, steering group, ...). Our aim is to gain partners for you in an efficient, successful manner. In order to reach this target we additionally mirror our results and findings from the market communication to you, so

as to develop, together with you, common modified communication if needed.

How do we finance our activities?

Our concept is based on 3 pillars: the first includes a fixed sum per month for the contract period and the 2 other pillars are pure success components. On the one hand a contract commission as soon as a partner signs a contract with you and on the other hand a participation in the licence sales over a period of 3 years after a company has become a partner.

-> a fair and acquisitive concept for both sides!



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