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*InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at [www.infotrends.com](http://www.infotrends.com).*

## **Emerging Markets for the Office Document Technologies (“ODT”) Industry**

### *A Study of Brazil, Russia, India and China (BRIC)*

- **Evaluate** the office copier, printer, supplies and document solutions software market potential for Brazil, Russia, India and China from a small, medium and large business segment perspective
- **Understand** end-user acquisition and usage behaviors associated with office document technologies
- **Understand** BRIC current market channel dynamics and expected future changes
- **Evaluate** BRIC market trends and dynamics
- **Forecast** the future and size up today’s market for hardware, software and supplies trends. (Standard InfoTrends market segments for each)

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## Introduction

The emergence and growth of developing economies across all regions of the global market comes at a critical time for the document imaging industry. Growth rates for traditional office copier, printer and MFPs, once the staple of this market, continue to show signs of flat growth in unit placements and increased erosion of profit margins in developed markets such as the U.S. and Western Europe, forcing vendors to find new sources of document imaging revenues and profits in an ever increasing competitive market.

Vendors must look to expand their product reach to alternative and lucrative global markets to maintain business growth. Vendor focus on emerging markets makes sense as they remain big targets for profitable business growth over the next twenty years. Brazil, Russia, India & China (BRIC) represent the largest geographies of “ODT” growth opportunity for vendors to capture.

The BRIC nations as a group will be bigger than the countries that define G7 by 2032. Between 2000 and 2005, the BRIC regions contributed approximately 28% of global GDP growth in terms of U.S. dollars and 55% in terms of Purchasing Power Parity (PPP). BRIC’s share of global trade continues to climb at a rapid rate. At close to 15% currently, it is now double its level in 2001. BRIC’s will grow at 10.4% CAGR through 2015.

End user behavior and buying patterns are unique in each of these regions and understanding these differences is critical to sustaining business growth. Each region has its own unique idiosyncrasies ranging from governmental regulations to purchasing requirements of customers. InfoTrends is launching a landmark study entitled “Emerging Markets for the Office Document Technologies Industry – A Study of Brazil, Russia, India and China,” to help office equipment vendors and suppliers understand the dynamics and industry impact of these emerging markets and clearly understand what is necessary to be successful in each.

## Project Objectives

This study is designed to provide vendors with critical planning information needed to develop successful growth strategies in each key developing market. It will:

- Profile and evaluate the total office document technology market potential of Brazil, Russia, India and China by business segmentation: small, medium and large businesses
- Focus on end users and channels to understand acquisition and usage behaviors associated with office document technologies (i.e., copier, printer, communication supplies and document solutions software).
- Develop a clear understanding of the size, nature and future growth potential for copiers and printers. Generate placements, installed base, forecast and trend analysis.
- Establish and evaluate current hardcopy supplies (i.e., paper & cartridges) market size, forecast and trends and trends analysis.
- Establish and evaluate workgroup and departmental office document software (i.e., capture/routing, document output, document management and device management applications) market size, trends and growth potential.
- Profile current channel landscape and expected changes over time as each developing market matures.
- Examine current purchasing behavior, brand awareness and preferences of both end users and channel.

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## Critical Questions Answered by the Study

### Copiers/Printers/MFPs (A3/A4)

- Types of digital output devices used
- Purchasing source
- Type of advertising motivating purchase
- Purchasing frequency (cycles, last purchases made, etc.), and purchase method
- Printers/copiers purchased new vs. used
- Purchasing criteria for next office imaging device
- Importance of functions in next multifunction office device purchase
- Viability of modular approach (the ability to add functionality after the initial purchase) to office equipment
- Types of digital output devices at various locations
- Main applications for black and white printing/copying
- Main applications for color printing/copying
- Percentage of printing/copying on each device that is in color
- # of color pages printed each month

### Document Solutions

- Types of document solutions used at various locations
- Important of software applications that offer specific functionality to an office
- Source of past document solution purchases
- Percentage of MFPs connected to company networks
- # of copies and prints that are made from each copier/printer
- Enforcement of policies around printing/copying to cut down costs
- Hardcopy documents filing practices
- Percentage of MFP's that use the scanner feature
- Importance of beginning to use other features such as scanning
- Electronic file saving practices
- Files sharing throughout an organization
- Future plans for an electronic document repository

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## Communication Supplies

- Method of purchasing toner (inkjet) cartridges
- Source for replacement supplies (toner and/or ink cartridges)
- Brands of toner (inkjet) cartridges used (for printer, for copier) and how that compares to the brand of the machine
- Use of refilled/remanufactured laser toner cartridges (and brand)
- Source of copier toner and how that compares to the service provider for the copier
- Source for laser toner cartridges
- Total annual (monthly) spending on laser toner cartridges, inkjet cartridges, printer and copier paper
- Impact dot matrix printers and percent of printing that's done on impact/dot matrix

## Market Research

This study will use a combination of primary and secondary research to determine the market requirements and opportunities for office document technology in the emerging BRIC markets.

### Secondary Research

InfoTrends has conducted extensive research in the office document market space. Relevant research reports and forecasts will be leveraged as part of this study. We will also thoroughly examine existing market information from a variety of sources, including government and industry association data and published reports.

### Primary Research

InfoTrends will conduct the following primary research initiatives in each of the 4 regions.

#### ***Structured Survey with End Users (300)***

InfoTrends will conduct structured telephone interviews in each of the BRIC regions with end-users from micro (under 20 employees), small (20-99 employees), medium (100-499 employees), and large companies (500+ employees). The surveys will be critical in understanding acquisition and usage behaviors associated with office document technologies.

#### ***Personal Interviews with End Users (up to 10)***

InfoTrends will conduct in-depth interviews with qualified end users. The interviews will provide subscribers with a detailed understanding of user behaviors in regards to technology adoption, acquisition, brand inclinations and usage.

#### ***Interviews with Resellers/Distributors (5-10)***

InfoTrends will also conduct in-depth interviews with leading resellers/distributors. The interviews will help subscribers understand the go-to-market strategies, product offerings and vendor sales support programs for distributors, office equipment dealers, Value Added Resellers and retailers. The interviews will be critical in profiling the current channel landscape and expected changes over time as each developing market matures.

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## ***Interviews with Vendors (5-10)***

InfoTrends will conduct in-depth interviews with leading vendors in each region. The interviews will provide subscribers with insight into the complexities of supply chain, market penetration, target markets, history in country, services offered, channel mix and service mix. The interviews will be critical in profiling the current vendor landscape and expected changes over time.

## ***Interviews with Government Agency***

InfoTrends will conduct an in-depth interview with the governing body in each region. This interview will be essential in understanding government regulations, importation and taxation rules for doing business in each of the BRIC regions.

## **Analysis & Project Deliverables**

We will conduct extensive analysis of the desk research, personal interviews, and surveys to develop a comprehensive understanding of the opportunities and issues with BRIC regions. Clients will receive a combination of reports, presentation materials, and data for senior management, product managers and planners, and sales and marketing executives. These materials will include:

- Executive summary with key findings
- PowerPoint style document with bullets
- PowerPoint presentation with charts
- Developing market demographic profiles
  - o In-depth market profile for each BRIC region.
  - o Detailed market size and forecast for hardware, software and supplies 2007 – 2012.
  - o Highlights and analysis of the major market trends driving growth and opportunity in each region
    - Product and technology trends
    - Pricing, services and channels
- Market forecast
  - o Copiers, printers, MFPs (A3/A4)
    - Units
    - Average Selling Price (ASP)
    - Hardware Revenue
    - Installed Base (IB)
  - o Communication supplies
    - Average Monthly Page Volumes (AMPV)
    - Total Print Volume

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- Duplex Rate
- Paper Tons
- Toner Pounds
- Photoreceptor Units & Dollars
- Ink Jet Cartridge Units & Dollars
- Total Supplies Dollars
- o Network document solutions
  - License Revenue
  - Maintenance Revenue
  - Services Revenue
- Data tabulations

## Project Schedule

InfoTrends intends to begin this project in July 2008. Based on the following schedule, the project will be completed with material distributed by February 2009. Throughout the project, InfoTrends will issue regular updates on the project status.

### Brazil & India

<i><b>Milestone</b></i>	<i><b>Completion</b></i>
Desk Research	July/August
Field Research	August/October
Analysis	November/December
Publish	January

### Russia & China

<i><b>Milestone</b></i>	<i><b>Completion</b></i>
Desk Research	August/September
Field Research	September/November
Analysis	December/January
Publish	February

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## **Terms and Conditions**

### **Liability for Advice**

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

### **Copyrights**

InfoTrends retains all copyrights. The reproduction of any materials is prohibited without written consent from InfoTrends.

### **Confidentiality**

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

### **Timely Delivery**

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

### **Terms**

1/3rd of fee upon initiation, 1/3rd upon completion of structured survey work, and 1/3rd upon report delivery.

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## Authorization Form

Emerging Markets for the Office Document Technologies Industry – A Study of Brazil, Russia, India and China (BRIC)

For more information on the study or how to order, please send an e-mail to [sales@infotrends.com](mailto:sales@infotrends.com). Please enter my order as follows (fax completed form to +1 781 616 2121):

	<u>Early Subscriber by August 8th</u>	<u>Subscriber after August 8th</u>	
<input type="checkbox"/> <b>4 Regions</b>	<b>\$49,995</b>	<b>\$59,995</b>	
<input type="checkbox"/> Report addressing key issues, findings and overall recommendations			
<input type="checkbox"/> Market forecast for four regions (placements, IB, page volume, & supplies)			
<input type="checkbox"/> Analysis of all regionally specific survey data			
<input type="checkbox"/> PowerPoint presentation with top-level survey results			
<input type="checkbox"/> <b>1 Region</b>	<b>\$14,995</b>	<b>\$18,995</b>	
<input type="checkbox"/> Report addressing key issues, findings and overall recommendations			
<input type="checkbox"/> Market forecast for one region (placements, IB, page volume, & supplies)			
<input type="checkbox"/> Analysis of regionally specific survey data (one region)			
<input type="checkbox"/> PowerPoint presentation with top-level survey results			
Please select region:			
<input type="checkbox"/> Brazil	<input type="checkbox"/> Russia	<input type="checkbox"/> India	<input type="checkbox"/> China
<input type="checkbox"/> <b>Data Tabulations for 4 Regions</b>		<b>\$9,995</b>	
<input type="checkbox"/> <b>Data Tabulations for 1 Region</b>		<b>\$2,995</b>	
<input type="checkbox"/> <b>Personal presentation</b>		<b>\$2,500 (plus travel expenses)</b>	

Purchase order number: \_\_\_\_\_

Signature \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Country \_\_\_\_\_

Telephone \_\_\_\_\_

E-mail \_\_\_\_\_