

the short run, since software has never been subject to a prior import permit, however, a broader installed capacity of hardware will necessarily translate into increased software sales.

TABLE 1
THE MEXICAN MARKET FOR THE COMPUTER INDUSTRY
(millions of U.S. dollars)

	1985	1986	1987	1988	1989	1990	1993p
Hardware	248.9	268.5	349.6	398.6	478.3	574.0	806.4
Software	80.9	98.5	115.4	147.8	172.9	204.1	326.9
Maint & Serv	103.3	120.4	125.3	177.5	230.6	295.2	485.0
TOTAL	433.1	487.4	590.3	723.9	881.8	1073.3	1618.3

Note: p=projected

Source: Dr. Ricardo Zermeño - SELECT

3.2 THE MEXICAN HARDWARE MARKET

In 1990, the total computer hardware market, including mainframes, mini and microcomputers and their peripherals, amounted to \$575.2 million, up 20% from the \$478.3 million of 1989. Of this amount, \$362.3 million, or 63%, corresponds to sales of microcomputers and their peripherals, \$96.3 million (16.7%) to minicomputers and \$116.6 (20.3%) million to mainframes (see Table 2).

TABLE 2
THE MEXICAN MARKET FOR COMPUTERS
(millions of U.S. dollars)

CATEGORY	1985	1986	1987	1988	1989	1990	1993p
Microcomputers	76.4	101.5	135.3	198.1	281.9	362.3	554.0
Minicomputers	78.7	84.9	95.4	89.3	87.8	96.3	114.5
Mainframes	93.8	82.1	118.9	111.2	108.6	116.6	137.9
TOTAL	248.9	268.5	349.6	398.6	478.3	575.2	806.4

Note: p=projected

Source: Based on data by SELECT

The total installed base of computers in Mexico, based on a rough estimate, is of approximately 670 mainframes, 6,500 minicomputers, while microcomputers are expected to reach one million in 1991. There is a clear tendency towards IBM and compatible equipment and away from other PCs and home computers. The use of 8088/8086 PCs is still common in Mexico, but with a