

# Australia Information Technology Report Q4 2016

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## Abstracts

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**BMI View:** We forecast IT spending in Australia will increase at a CAGR of 4.3% throughout 2016-2020 to AUD46.5bn. The software and services segments are the biggest opportunity, where smart mining, cloud computing, the Internet of Things and cognitive computing solutions have great potential in Australia. This is due to high labour costs in a low-cost region, meaning labour substitution technologies will likely prove attractive to enterprises. The outlook is more subdued for computer hardware spending, where there is a reliance on replacement spending and smartphones could cannibalise PC purchase. Meanwhile, enterprise infrastructure spending will face a squeeze from the shift to the cloud.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** AUD8.2bn in 2016 to AUD8.9bn in 2020. Hybrid notebooks are expected to be a growth area in what will otherwise largely be a flat market based on replacement device sales.

**Software Sales:** AUD9.4bn in 2016 to AUD11.0bn in 2020. Data analytics software seeing strong demand, while application demand from small-and-medium-sized enterprises should be driven higher by availability of software-as-a-service solutions.

**IT Services Sales:** AUD21.6bn in 2016 to AUD26.6bn in 2020. Mining is a large part of Australia's economy, but traditionally a low-spending vertical, however investment in 'smart mining' solutions is emerging as a positive trend that bolsters an already bright outlook due to a deepening cloud computing market.

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