

Czech Republic Information Technology Report Q3 2016

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Abstracts

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BMI View: We expect relatively strong growth in Czech IT spending over the medium term, with a CAGR of 5.6% forecast for 2016-2020 to CZK99.6bn. The market will be even more lucrative in US dollar terms due to koruna appreciation, though this could be a squeeze on the large electronics export industry and the growth of the software development industry. Meanwhile, for domestic spending, a strengthening currency is positive for economic confidence and household purchasing power that will support retail PC volume growth, as well as upside for increasing PC average selling prices as the middle class becomes more affluent.

Latest Updates & Industry Developments

Computer Hardware Sales: CZK30.2bn in 2016 to CZK33.6bn in 2020, a compound annual growth rate (CAGR) of 2.7% in local currency terms. Desktop market will underperform, but strong retail sales of notebooks and tablets expected as household incomes register significant increases.

Software Sales: CZK18.9bn in 2016 to CZK24.7bn in 2020, a CAGR of 7.0%. Cloud delivery models will result in some price erosion, but this drag will be offset by a deepening of the enterprise applications market to more small- and medium-sized enterprises.

IT Services Sales: CZK31.1bn in 2016 to CZK41.4bn in 2020, a CAGR of 7.4%. Growing demand from enterprises and the public sector for outsourcing and cloud service will underpin IT services spending growth outperformance over the

medium term.

Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

IT SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Enterprise Trends - GVA By Vertical (Czech Republic 2015-2020)

Table: IT Industry - Historical Data And Forecasts (Czech Republic 2013-2020)

Industry Risk/Reward Index

Table: Europe IT Risk/Reward Index, Q3 2016

Market Overview

Hardware

Software

Cloud Computing

IT Services

Industry Trends And Developments

IT Hardware Trade

Table: CEE IT Hardware Trade, 2010-2015

Table: Czech Republic IT Hardware Trade, 2010-2015

Local Industry

Table: Czech Republic IT Hardware Industry Performance, 2009-2014

Table: Czech Republic Software And Services Industry Performance, 2009-2014

Regulatory Development

Competitive Landscape

Retailers

Table: Electronics Retailers

Table: E-Commerce Retailers

IT Vendors

International Companies

Table: Foxconn CZ

Table: Lenovo

Local Companies

Table: AVG Technologies

Table: InveaTech

Table: Unicorn Systems

Regional Overview

Demographic Data

Demographic Forecast

Table: Population Headline Indicators (Czech Republic 1990-2025)

Table: Key Population Ratios (Czech Republic 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Czech Republic 1990-2025)

Table: Population By Age Group (Czech Republic 1990-2025)

Table: Population By Age Group % (Czech Republic 1990-2025)

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: IT Risk/Reward Index Indicators

Table: Weighting Of Components

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