

France Information Technology Report Q3 2016

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Abstracts

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BMI View: The outlook for IT spending in France over the medium term is positive, but moderated by a subdued economic growth forecast and political risks that could potentially result in deferred or downscaled investment. Our core scenario is for spending to increase at a CAGR of 3.4% over 2016-2020 to EUR60.9bn in 2020, with software and services demand growth expected to outperform the hardware segment. Wider adoption of cloud computing and internet of things solutions will support services spending growth, but the maturity of the PC and enterprise hardware market offers weaker growth prospects.

Latest Updates & Industry Developments

Computer Hardware Sales: EUR16.9bn in 2016 to EUR18.0bn in 2020 with a compound annual growth rate (CAGR) of 1.7%. An ageing of the desktop and notebook installed base is an opportunity, but vendors will face a challenge from lower-priced tablets and smartphones, and as such we expect only moderate growth.

Software Sales: EUR12.5bn in 2016 to EUR14.6bn in 2020 with a CAGR of 3.8%. Data analytics will be an area of outperformance for sales to large enterprises, while wider adoption among SMEs is another area with significant potential.

IT Services Sales: EUR23.9bn in 2016 to EUR28.3bn in 2020 with a CAGR of 4.4%. Cloud computing in France is an accelerating market and there is catch-up potential to global leaders such as the US that should drive the IT services segment over the medium term.

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