

France Information Technology Report Q4 2016

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Abstracts

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BMI View: Brexit and a terrorist attack in Nice resulted in a small downgrade to the IT spending forecast for France in the Q4 update. An increase in political and economic uncertainty has weakened already fragile economic sentiment in France, but we still envisage stronger performance in 2016 compared to 2015 when the extent of euro depreciation against the US dollar was a major drag on the hardware segment. Looking beyond short-term risk factors, there are opportunities in France if Paris captures a share of any financial services relocation away from London after Brexit, as well as in specific product categories such as cloud computing, cyber security and Internet of Things.

Latest Updates & Industry Developments

Computer Hardware Sales: EUR16.9bn in 2016 to EUR17.9bn in 2020 with a compound annual growth rate (CAGR) of 1.5%. An ageing of the desktop and notebook installed base means replacement spending could be unlocked by vendor innovation and/or an economic upturn, but the core scenario is for a flat market over the medium term.

Software Sales: EUR12.5bn in 2016 to EUR14.5bn in 2020 with a CAGR of 3.6%. We see short-term impact from Brexit, but French economic performance will be important to the market if further weakness undermines investment in projects by major verticals.

IT Services Sales: EUR23.9bn in 2016 to EUR28.1bn in 2020 with a CAGR of 4.2%. Public sector IT budget savings initiative will be a squeeze, but we expect this to be offset by wider cloud computing adoption in France where it is an

accelerating market and there is catch-up potential to global leaders such as the US.

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