

Germany Information Technology Report Q1 2016

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Abstracts

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BMI View: Germany's IT market is lucrative due to an affluent consumer base and strong demand from a diversified enterprise base, and we envisage significant opportunities for vendors at the premium end of the market. Enterprise adoption of complex, high-value solutions is expected to increase over the medium term as modernisation is promoted through the 'Industrie 4.0' initiative. The deepening of the enterprise applications and infrastructure markets through cloud computing services is another area where vendors can capitalise on robust demand growth. The overall growth outlook is however subdued due to a weak economic outlook and the saturation of core device and application markets in Germany. We forecast a CAGR of 2.6% for IT spending to a total of EUR58.3bn in 2019, with the hardware segment expected to exhibit the weakest growth.

Latest Updates & Industry Developments

Computer Hardware Sales: EUR24.6bn in 2016 to EUR26.0bn in 2019, a compound annual growth rate (CAGR) of 1.8%. After weak performance in 2015, we expect a gradual medium-term recovery in hardware spending, though growth rates will on the whole remain subdued as a result of the maturity of the market.

Software Sales: EUR9.2bn in 2016 to EUR9.9bn in 2019, a CAGR of 2.5%. Enterprise modernisation will remain the primary driver of software spending growth in Germany, with complex deployments by large enterprises and the deepening of the small- and medium-sized enterprise market through software-as-a-service provision the main growth engines.

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