

# Germany Information Technology Report Q3 2016

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## Abstracts

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**BMI View:** A mature PC market and potential cannibalisation of retail demand by increasingly powerful smartphones mean the hardware outlook is subdued, but we believe IT market growth momentum will be sustained over the medium term by enterprise demand for software and services. Enterprise adoption of complex, high-value solutions such as the Internet of Things and cloud computing has solid momentum already, and is being promoted by the 'Industrie 4.0' initiative that could put Germany at the forefront of regional trends. For IT spending as a whole, we forecast a CAGR of 2.7% for IT spending to a total of EUR60.32bn in 2020.

### Latest Updates And Industry Developments

**Computer Hardware Sales:** EUR24.6bn in 2016 to EUR26.6bn in 2020, a compound annual growth rate (CAGR) of 1.8%. Deferred replacement spending in recent years means potential for market to bounce back as economy improves, but cannibalisation of retail PC demand by increasingly powerful smartphones adds uncertainty.

**Software Sales:** EUR9.2bn in 2016 to EUR10.2bn in 2020, a CAGR of 3.1%. Economic and political risks present downside to enterprise outlook, but momentum in complex deployments by large enterprises and the deepening of the small- and medium-sized enterprise market should sustain software spending growth.

**IT Services Sales:** EUR20.2bn in 2016 to EUR23.4bn in 2020, a CAGR of 3.7%. Adoption of Internet of Things and cloud solutions by German industrial and manufacturing firms bolsters an already strong outlook due to cloud services

demand and wider adoption of outsourcing, which should make IT services the outperforming segment over the medium term.

## Contents

BMI Industry View

SWOT

Industry Forecast

Recent Developments

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

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

Industry Risk Reward Index

Table: Europe IT Risk/Reward Index, Q3 2016

Market Overview

Hardware

Software

Cloud Computing

Services

Industry Trends And Developments

IT Hardware Trade

Table: Western Europe IT Hardware Trade, 2010-2015

Table: Germany IT Hardware Trade, 2010-2015

IT Industry Analysis

Table: Germany IT Hardware Industry, 2009-2014

Table: Germany Software & Services Industry, 2009-2014

Regulatory Development

Table: Government Authority

Competitive Landscape

Retailers

Table: Selected Electronics Retailers

Table: Selected E-Commerce Companies And Online Marketplaces

IT Vendors

Table: IBM

Table: Microsoft

Table: Allgeier IT Solutions

Table: GFT Technologies AG

Table: Materna Information & Communication

Table: MSG Systems

Table: Software AG

Table: T-Systems

Regional Overview

Demographic Forecast

## Demographic Outlook

Table: Population Headline Indicators (Germany 1990-2025)

Table: Key Population Ratios (Germany 1990-2025)

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

Table: Population By Age Group (Germany 1990-2025)

Table: Population By Age Group % (Germany 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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