

South Africa Information Technology Report Q3 2016

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Abstracts

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BMI View: We continue to hold a positive outlook for the South African IT market in 2016 and beyond, over our forecast period to 2020. Nevertheless, the primary concern is the heavy depreciation of the South African rand against the US dollar. Despite the rally throughout the first months of 2015, the fundamental economic issues weighing on the rand - infrastructure bottlenecks and strike action - remain intact, and we therefore expect diminished demand for hardware to continue in 2016, before stabilising in 2017. The strongest driver of growth in the IT market will be government spending via service expansion and modernisation efforts. There is also growing interest in IT solutions by SMEs looking to explore new sales and marketing channels, as well as to improve operations efficiencies, offering new opportunities. These factors will see the software and services segments outperform over the 2016-2020 forecast period.

Latest Updates And Industry Developments

Computer Hardware Sales: ZAR28.8bn in 2016 to ZAR35.7bn in 2020, a CAGR of 5.6% in local currency terms. Rand depreciation represents downside risk by squeezing household purchasing power, resulting in deferred purchases and substitution for cheaper models in South Africa's import dependent market.

Software Sales: ZAR18.0bn in 2016 to ZAR26.0bn in 2020, a CAGR of 9.2% in local currency terms. We believe the uptake of cloud-based software, which is less susceptible to piracy and through more flexible pricing will deepen the market to SMEs, will drive growth in software sales over the medium term.

IT Services Sales: ZAR31.2bn in 2016 to ZAR44.4bn in 2020, a CAGR of 9.4% in local currency terms. IT services will be the outperforming IT market segment,

with development of the business process outsourcing market and public sector modernisation spending key drivers.

Contents

BMI Industry View

SWOT

IT SWOT

Industry Forecast

Recent Developments

Structural Trends

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

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

Industry Risk Reward Index

Table: Middle East & Africa IT Risk/Reward Index, Q3 2016

Market Overview

Hardware

Software

Cloud Computing

Table: Cloud Vendor Developments

IT Services

Industry Trends And Developments

Table: Africa IT Hardware Trade, 2009-2014

Table: South Africa IT Hardware Trade, 2010-2015

Regulatory Development

Table: SITA

Table: National Broadband Policy Targets

Competitive Landscape

Retailers

Table: Major Electronics Retailers

Table: E-commerce And Online Retailers

IT Vendors

International Companies

Table: Hewlett-Packard

Local Companies

Table: Datatec

Table: Dimension Data

Table: EOH

Table: T-Systems South Africa

Regional Overview

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (South Africa 1990-2025)

Table: Key Population Ratios (South Africa 1990-2025)

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

Table: Population By Age Group (South Africa 1990-2025)

Table: Population By Age Group % (South Africa 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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