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info@marketpublishers.com

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Abstracts

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BMI View: We maintain a relatively robust growth outlook for UK IT spending over the medium term in the Q116 update, with spending growth expected to outperform most other developed European markets with a CAGR of 3.4% over 2016-2019. The stronger economic environment is a key differentiator with other Western European markets, while the large financial sector will also make the UK a lucrative market for advanced software and services vendors. Market development will however be uneven, and we envisage a stagnant hardware market, while growth will be driven by areas such as the app economy, cloud computing and emerging technologies such as the Internet of Things and Big Data analytics.

Latest Updates & Industry Developments

Computer Hardware Sales: GBP19.7bn in 2016 to GBP20.2bn in 2019, CAGR of +0.5% in local currency terms. Market maturity means limited volume growth prospects, while the decline in desktop spending will partially offset a return to growth in the notebook and tablet markets.

Software Sales: GBP14.1bn in 2016 to GBP16.1bn in 2019, a CAGR of +4.4% in local currency terms. Complex enterprise software demand is growing in the financial services vertical, with SaaS SME demand another important growth area for software vendors.

IT Services Sales: GBP26.5bn in 2016 to GBP30.9bn in 2019, CAGR of +5.0% in local currency terms. A deepening of the cloud computing market will be the

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key pillar of IT services spending growth outperformance, while smart services will also make a significant contribution in the later years of the forecast.

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