

# United Kingdom Information Technology Report Q2 2015

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## Abstracts

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**BMI View:** UK information technology sector growth will be driven by areas such as the app economy and cloud computing and there are promising signs for growth of emerging technologies such as data centres and Big Data that are subject to government support. However, we continue to point to significant downside as the elections in 2015 or a potential referendum on EU membership in 2017 could impact public spending. Spending is already squeezed by fiscal austerity measures, fragile business and consumer confidence and a decline in desktop and notebook shipments and the failure of high profile public IT projects in recent years has heightened public scepticism about further projects and resulted in much tighter scrutiny of spending. The result of these trends is a forecast for UK IT spending to increase 2.5%, to almost GBP59.0bn in 2015.

### Headline Expenditure Projections:

Computer Hardware Sales: GBP20.03bn in 2014 to GBP20.05bn in 2015, +0.1% in local currency terms. The slowdown in the tablet market will only be partially offset by growing demand for hybrid notebooks, resulting in a stagnant market in value terms.

Software Sales: GBP13.11bn in 2014 to GBP13.56bn in 2015, +3.4% in local currency terms. Enterprisesoftware demand is growing, with SaaS SME demand and large enterprise demand for advanced solutions driving growth.

IT Services Sales: GBP24.41bn in 2014 to GBP25.35bn in 2015, +3.9% in local

currency terms. The high level of IT services adoption among public institutions means growth will increasingly be driven by the enterprise sector in the UK, but cloud computing adoption will ensure IT services growth out performance.

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