

Глобальный рынок ПО 2014: тенденции и перспективы развития

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Ключевые тезисы

- *Век Потребителя и 4 императива бизнеса*
- *«Клиентское» ПО – объёмы пока невелики, но максимальные темпы роста*
- *Сегмент ПО, движимый **Smart & Cloud** – флагман развития глобального рынка ИКТ*
- ***Apps, Analytics, As-A-Service** - три «А», три драйвера рынка ПО*
- ***BI + ECM + Collaboration** - лидеры роста в сегменте приложений*

Ожидания потребителей, и даже в России 😊, постоянно растут...

Экспертная
поддержка
продукта

Поддержка
по электронным
каналам

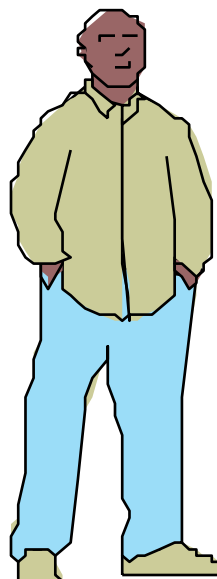
Компания
знает мою
«историю»

Возможности
самообслуживания

Проактивная
поддержка и
уведомления

Систематический
«канальный»
опыт

«Увеличенные»
часы
обслуживания



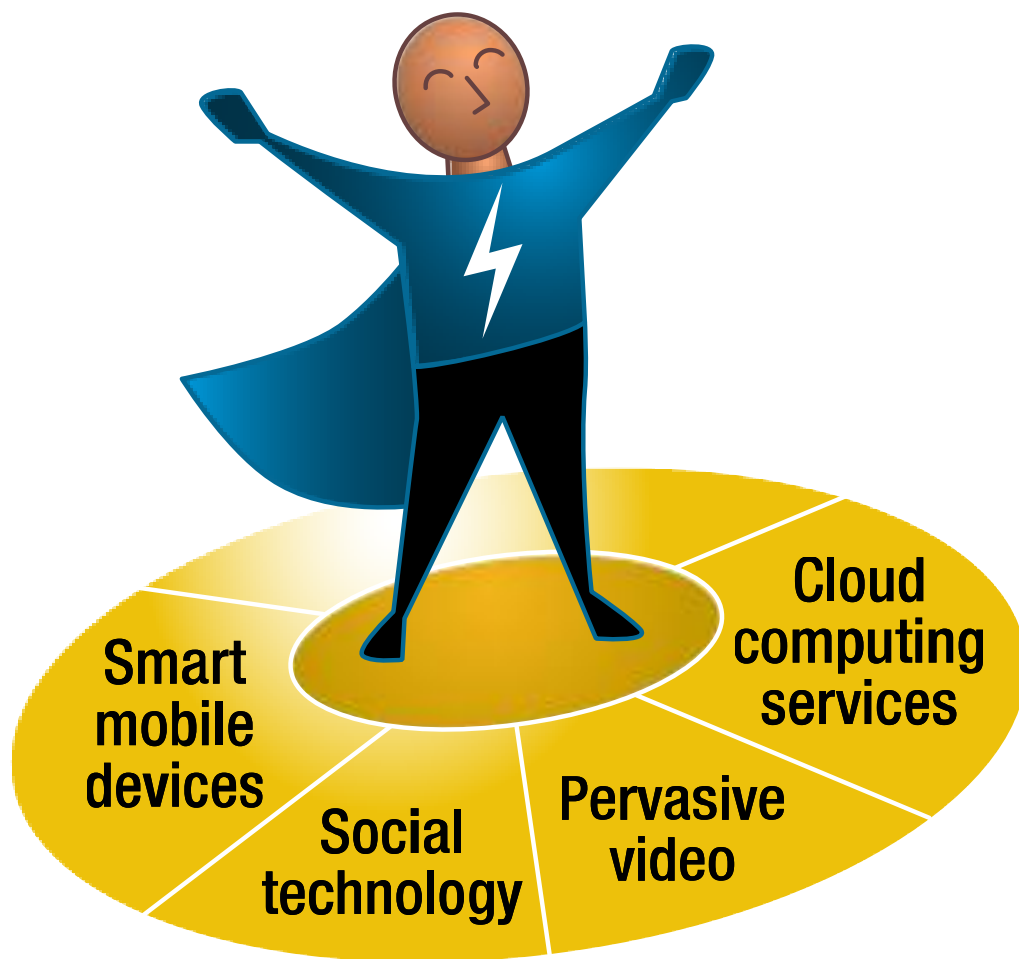
**Сегодняшний
потребитель**



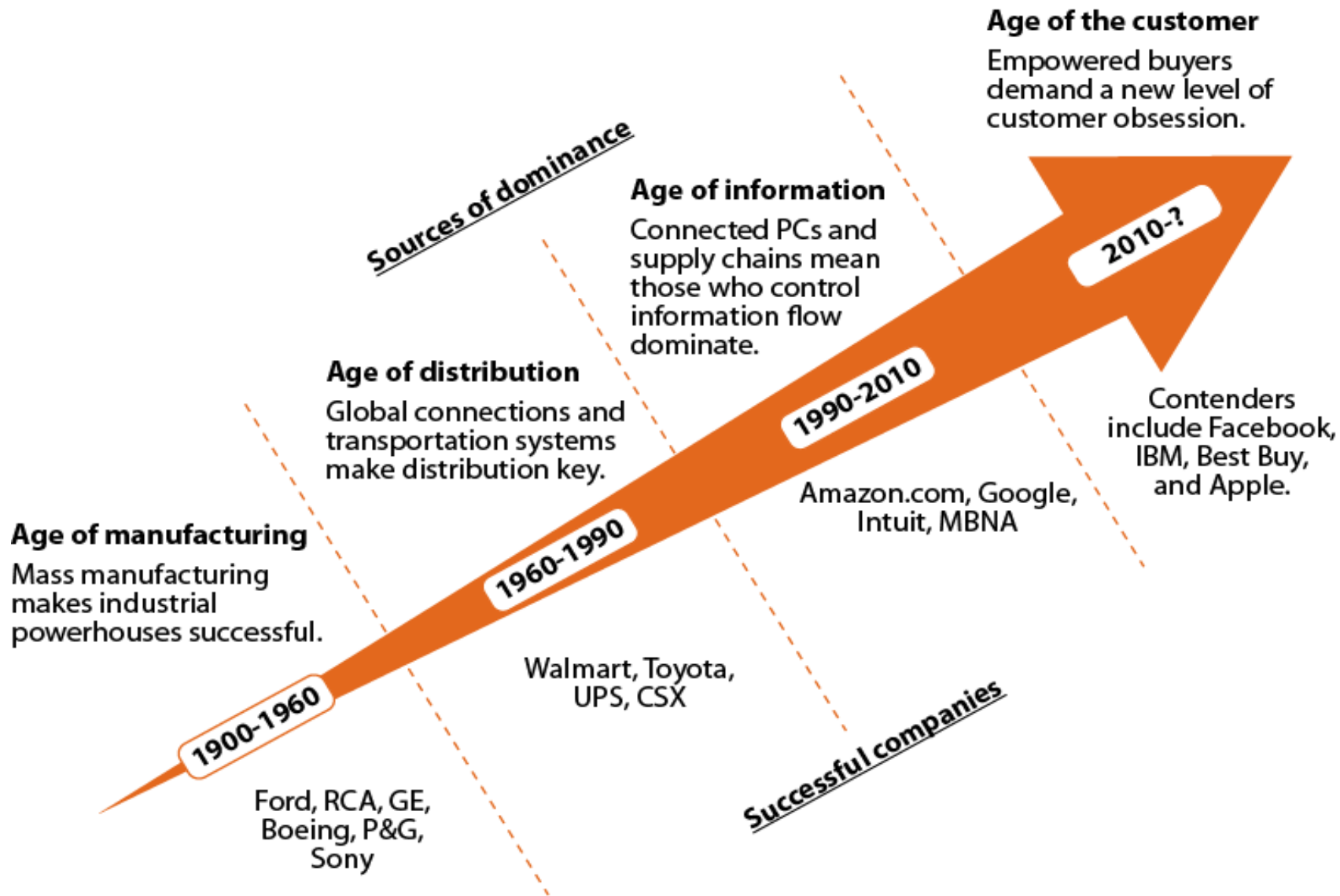
Формируется новая сложная цифровая экосистема



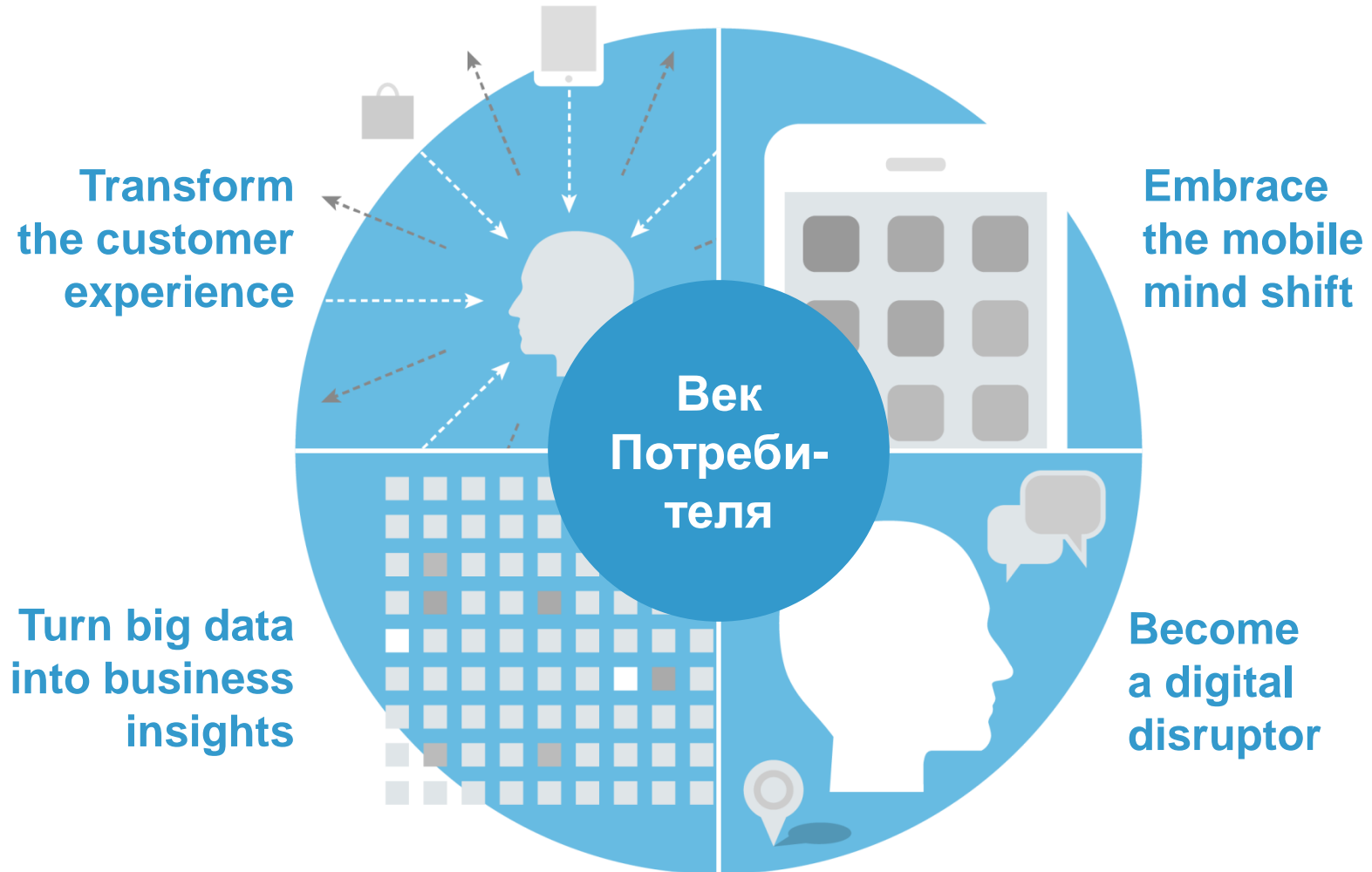
Технологии значительно «усиливают» возможности и влияние как потребителей, так и сотрудников!



Экономика вступила в Век Потребителя...



... с четырьмя императивами для бизнеса



«Мобильность» - основа «цифрового разрыва»

Russia device landscape - 2017

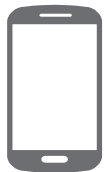
Total Population

142M



Unique mobile subscribers

105M



55%

Of unique mobile subscribers
have smartphones



49M

Mobile internet users



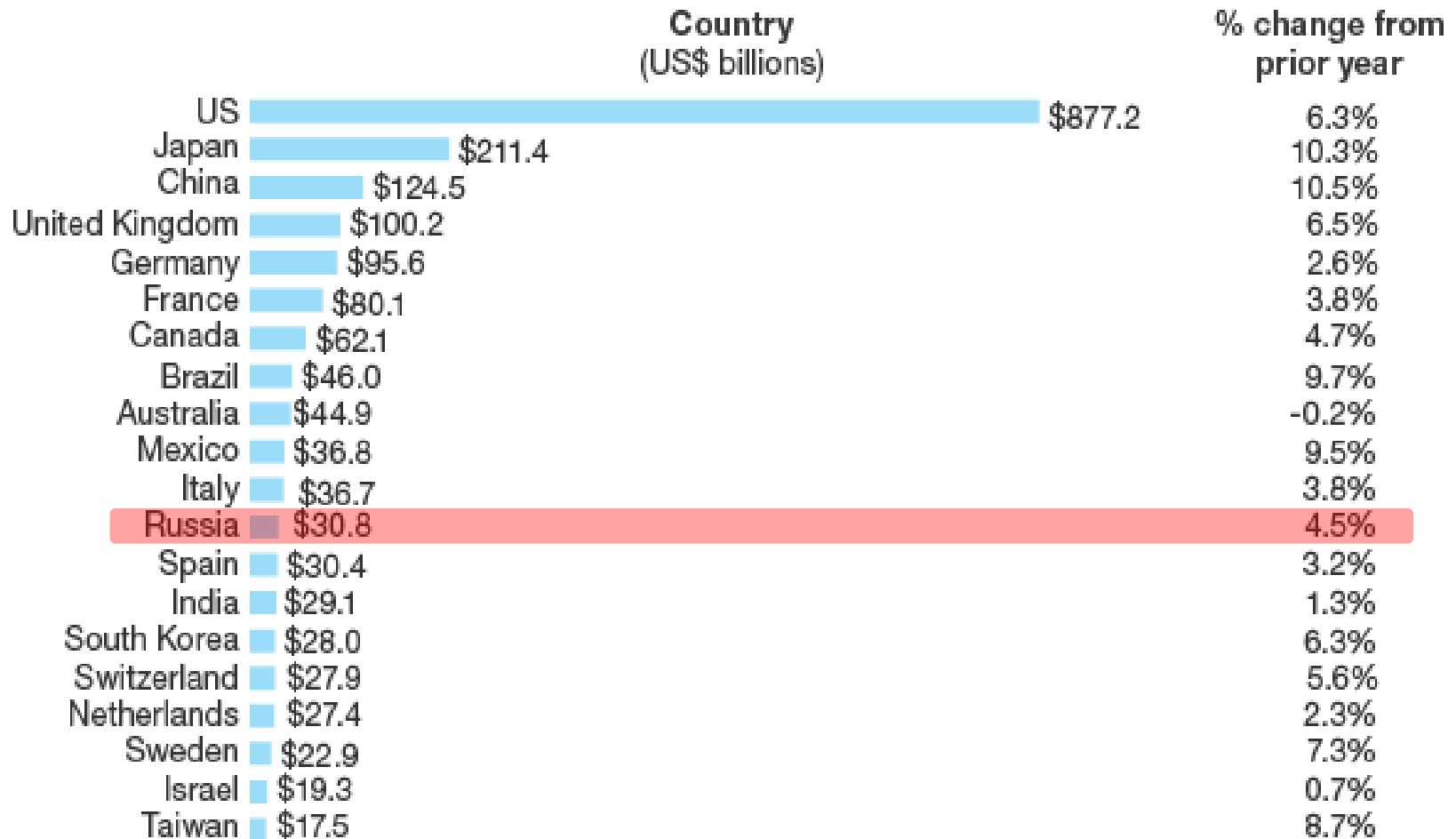
Tablet installed base of

26.5M

Source: Forrester Research World Mobile Adoption Forecast 2013-2018,
Forrester Research World Smartphone Adoption Forecast 2012-2017,
Forrester Research World Tablet Adoption Forecast 2012-2017

The 20 Largest Technology Markets In 2014

9-2 | The US extends its lead as the largest tech market measured in US dollars in 2014



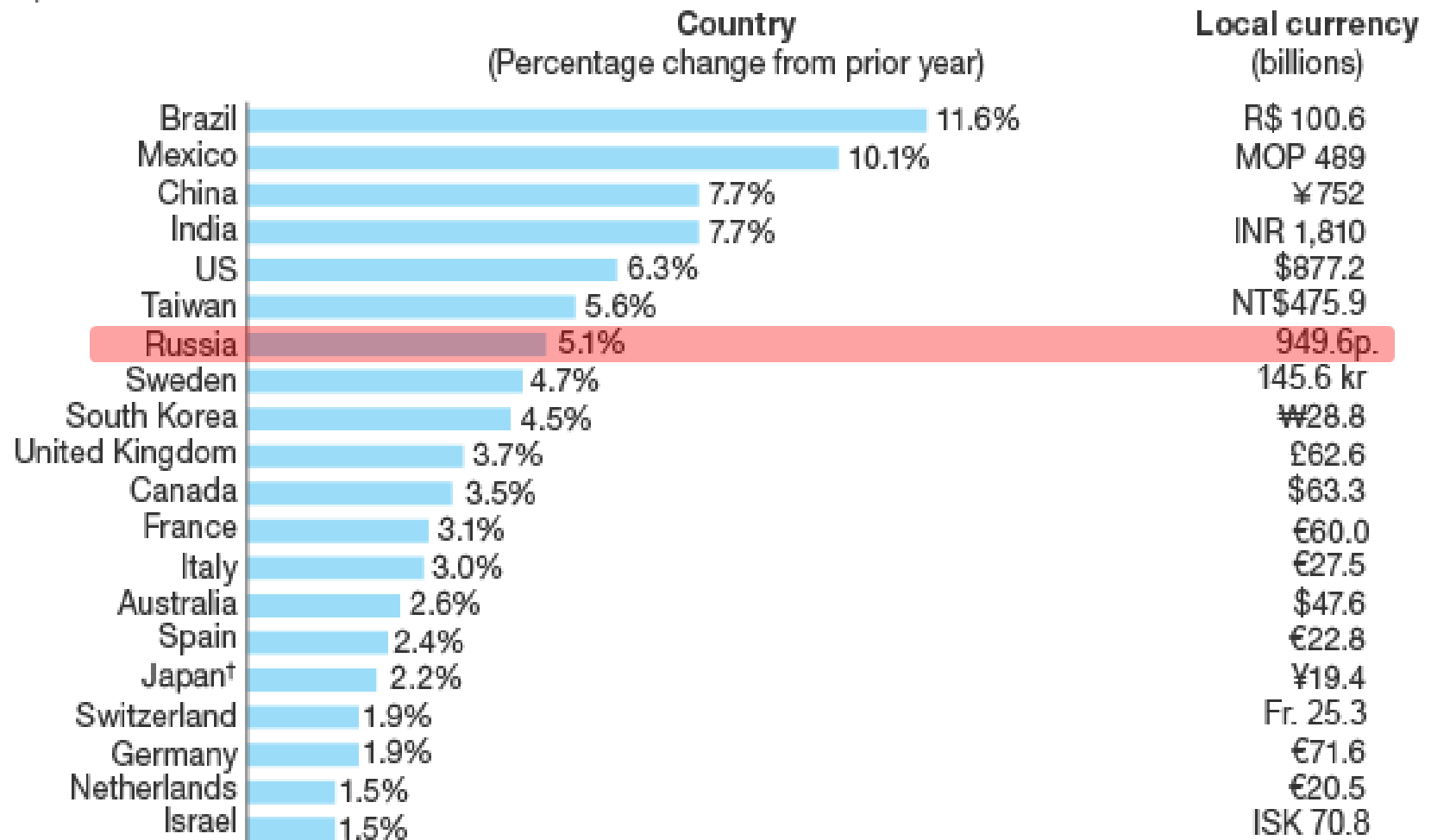
*Forrester forecast

†Trillions of local currency

The 20 Fastest Technology Markets In 2014

 The spreadsheet associated with this figure contains details about this forecast.

9-1 | Brazil, Mexico, China, India, and the US will have the fastest growth in 2014

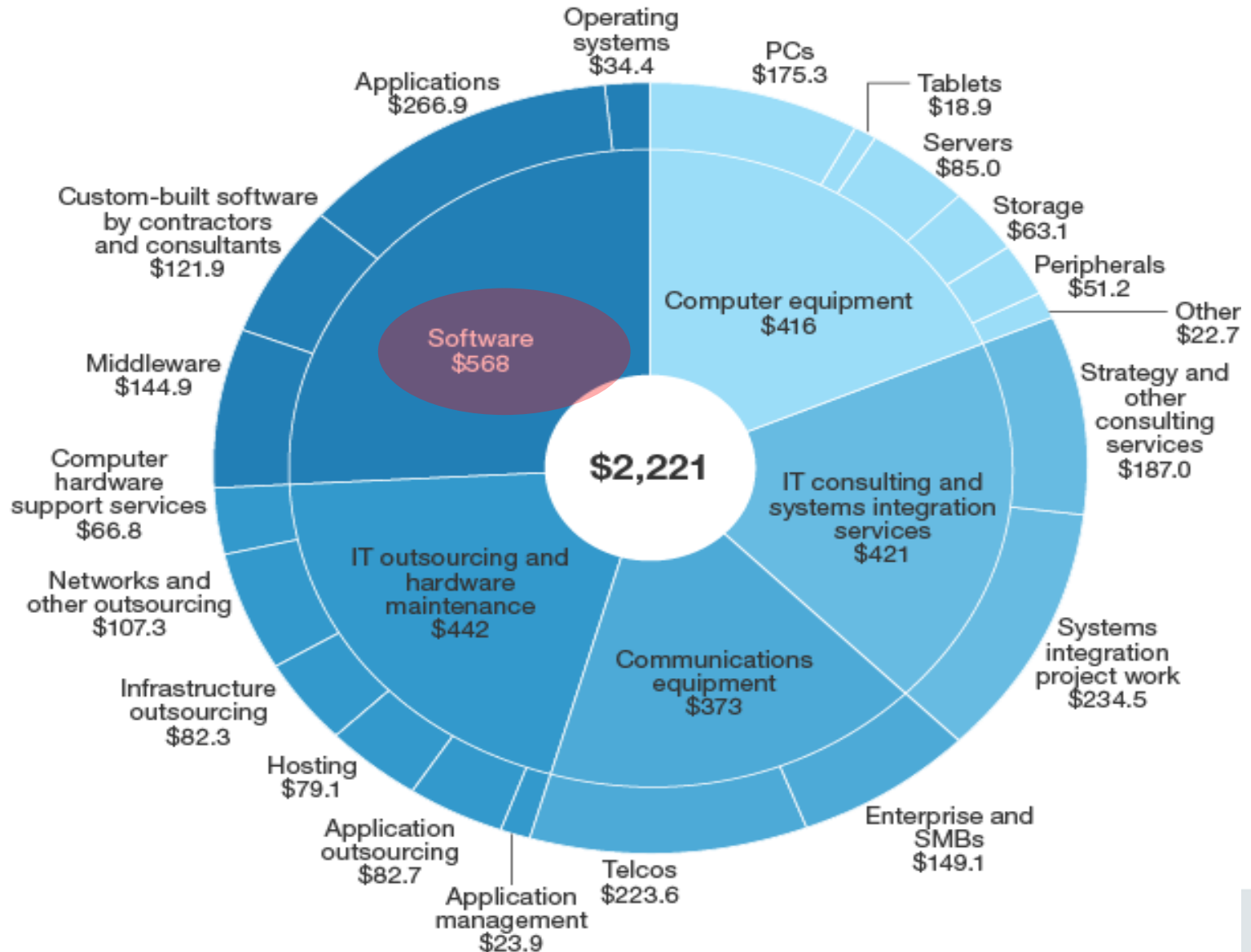


The Global Tech Industry Wheel 2014

FORREST

The spreadsheet associated with this figure contains additional data.

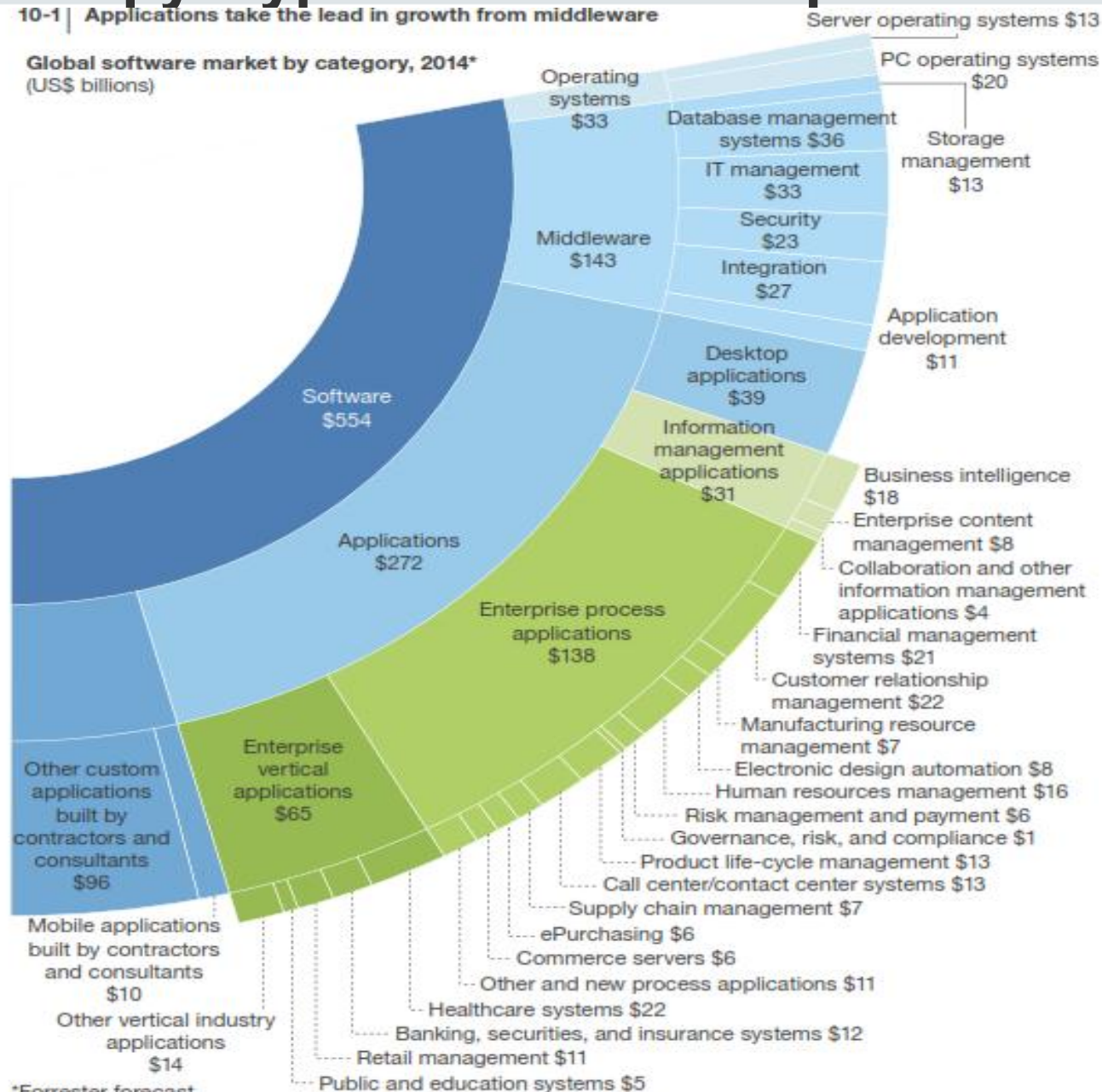
Global business and government spending on IT products and services
(US\$ billions)



Структура глобального рынка ПО

10-1 | Applications take the lead in growth from middleware

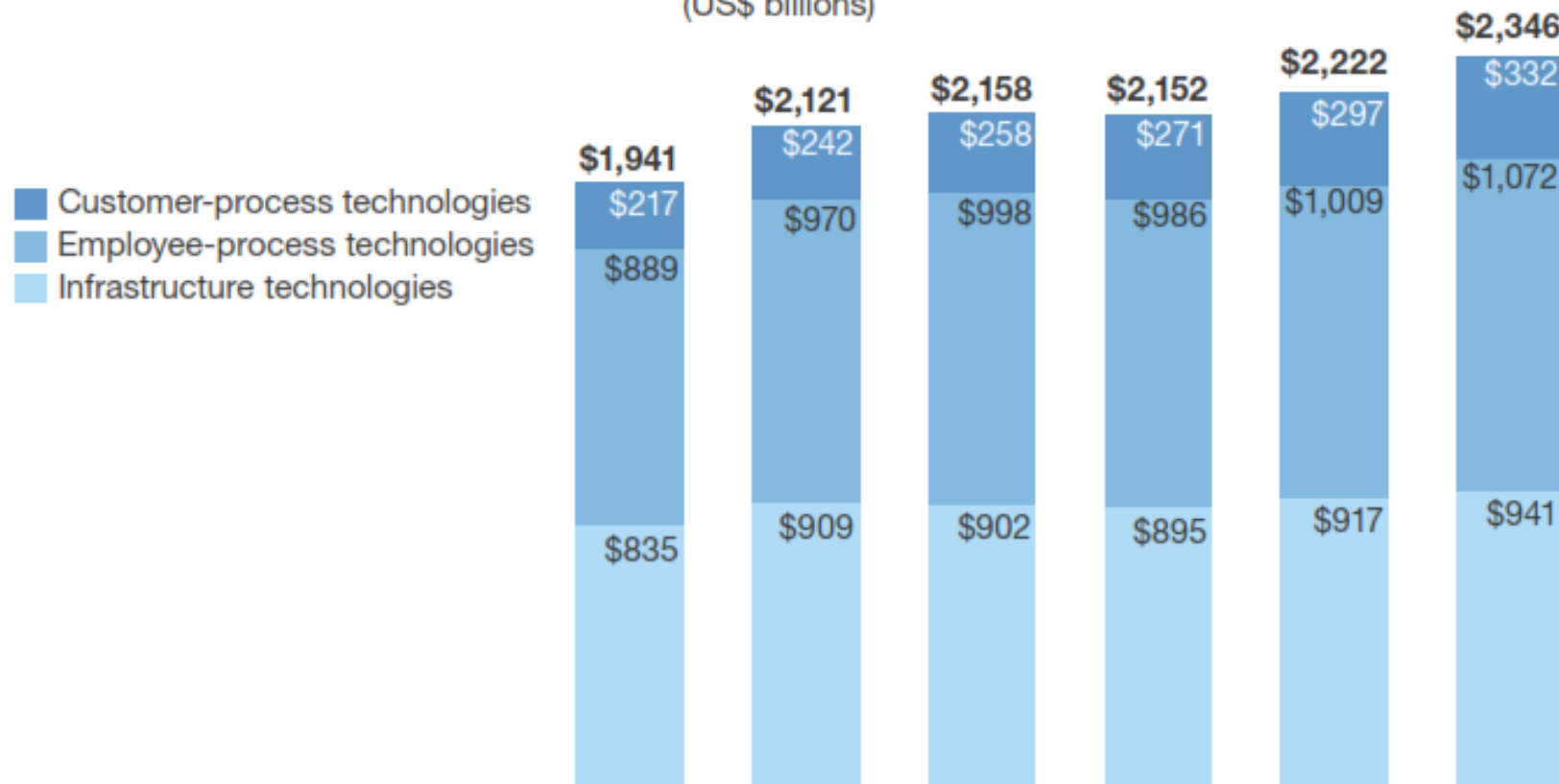
Global software market by category, 2014*
(US\$ billions)



*Forrester forecast

«Клиентские» технологии – максимальные темпы роста

Global business and government purchases of tech goods and services
(US\$ billions)



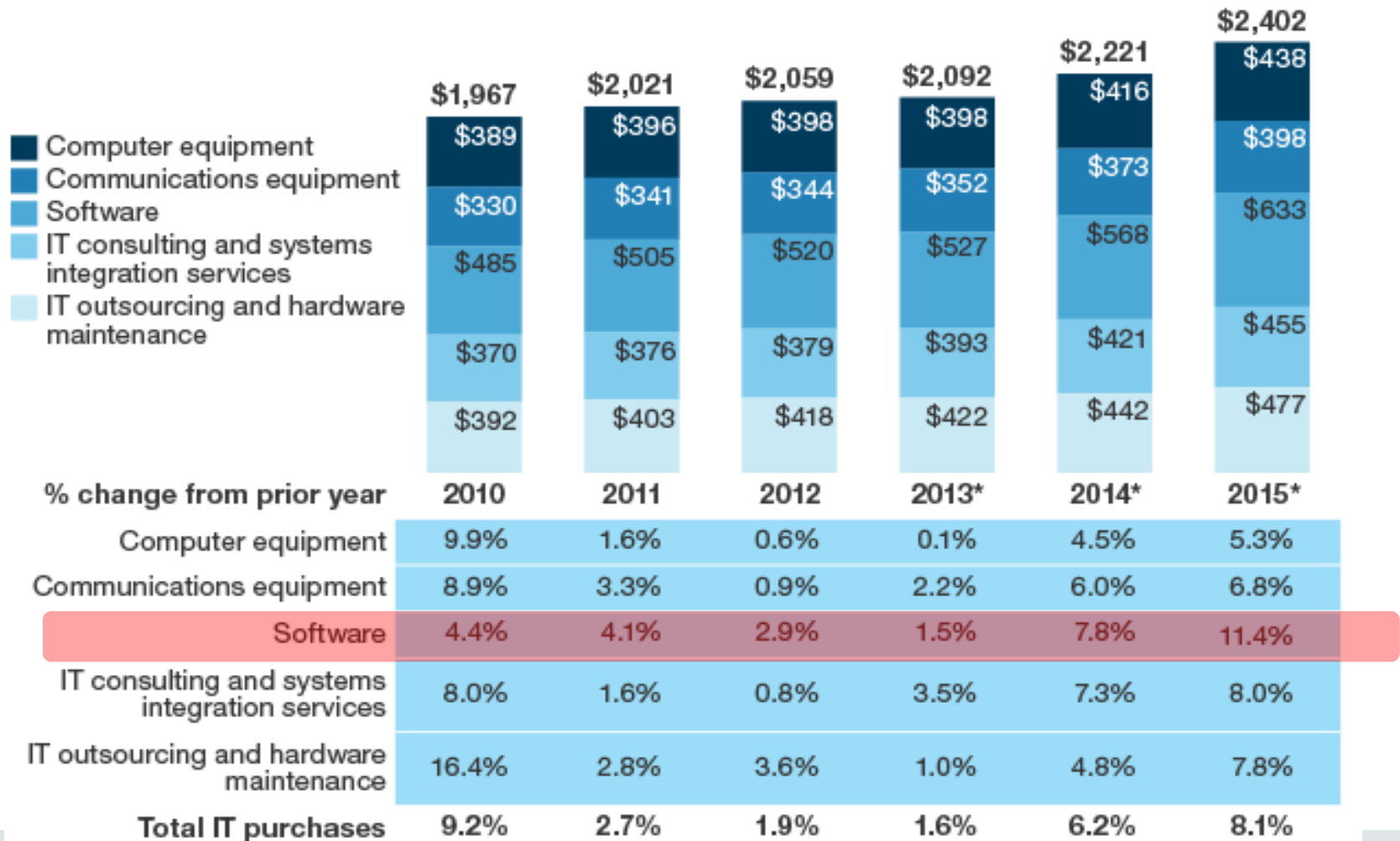
Percentage change from prior year	2010	2011	2012	2013	2014*	2015*
Customer-process technologies	4.6%	11.3%	6.9%	4.8%	9.6%	12%
Employee-process technologies	5.0%	9.1%	2.9%	-1.2%	2.3%	6.3%
Infrastructure technologies	12.6%	8.8%	-0.8%	-0.8%	2.5%	2.7%
Total tech spending	8.1%	9.2%	1.8%	-0.3%	3.3%	5.6%

Global IT Purchases By Product, 2013 To 2015


 The spreadsheet associated with this figure contains details about this forecast.

3-1 Global IT purchases in US dollars will grow by 6.2% in 2014 to \$2.22 trillion

Global business and government purchases of IT goods and services
(US\$ billions)

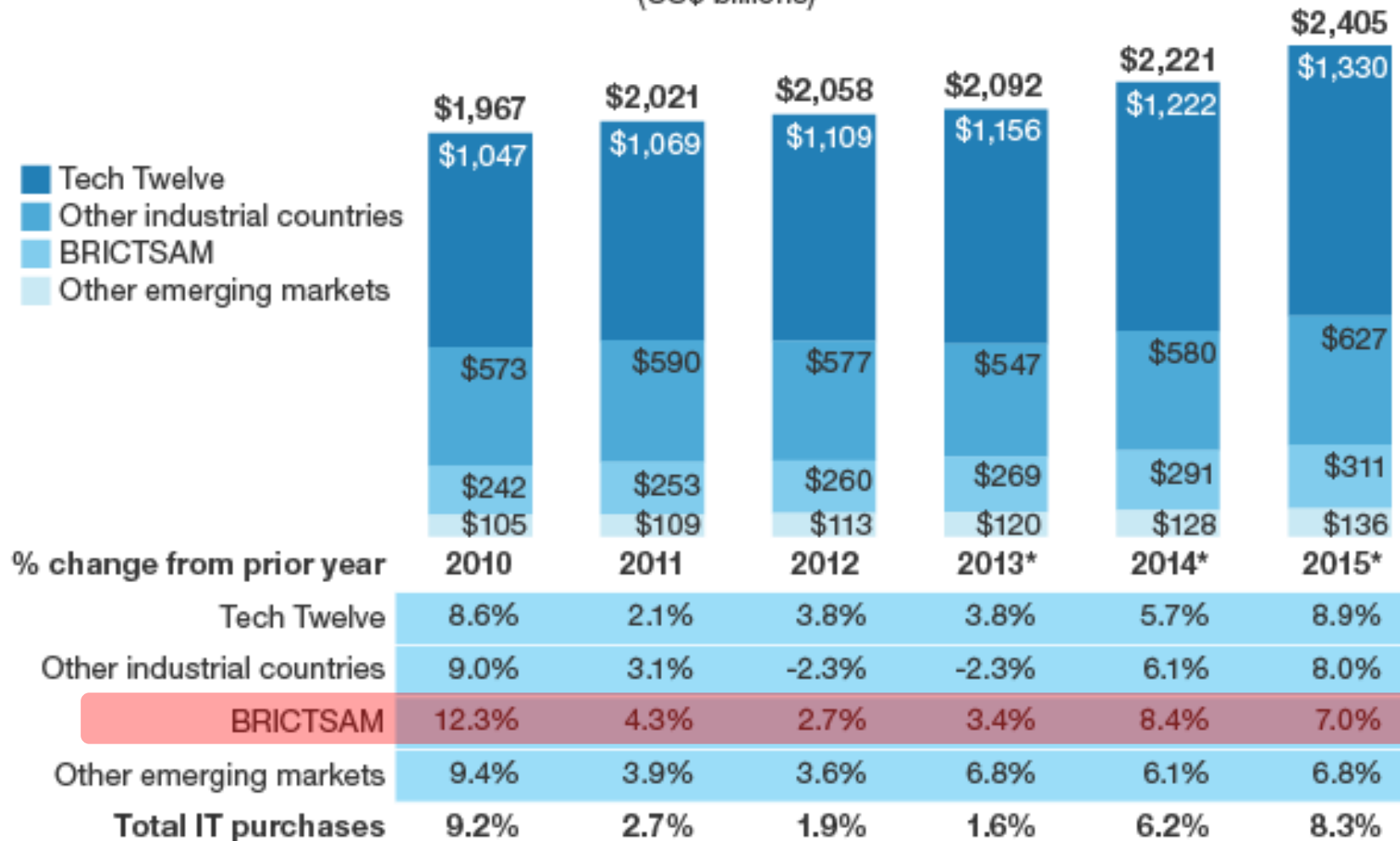


Tech Twelve Keep Pace With BRICTSAM

 The spreadsheet associated with this figure contains details about this forecast.

8-1 | Tech Twelve will have strongest tech market growth in 2015

Global business and government purchases of IT goods and services
(US\$ billions)



Apps, Analytics, And As-A-Service Are The Drivers Of Software Growth

10-2 | Among applications, process apps, business intelligence, and collaboration will grow fastest

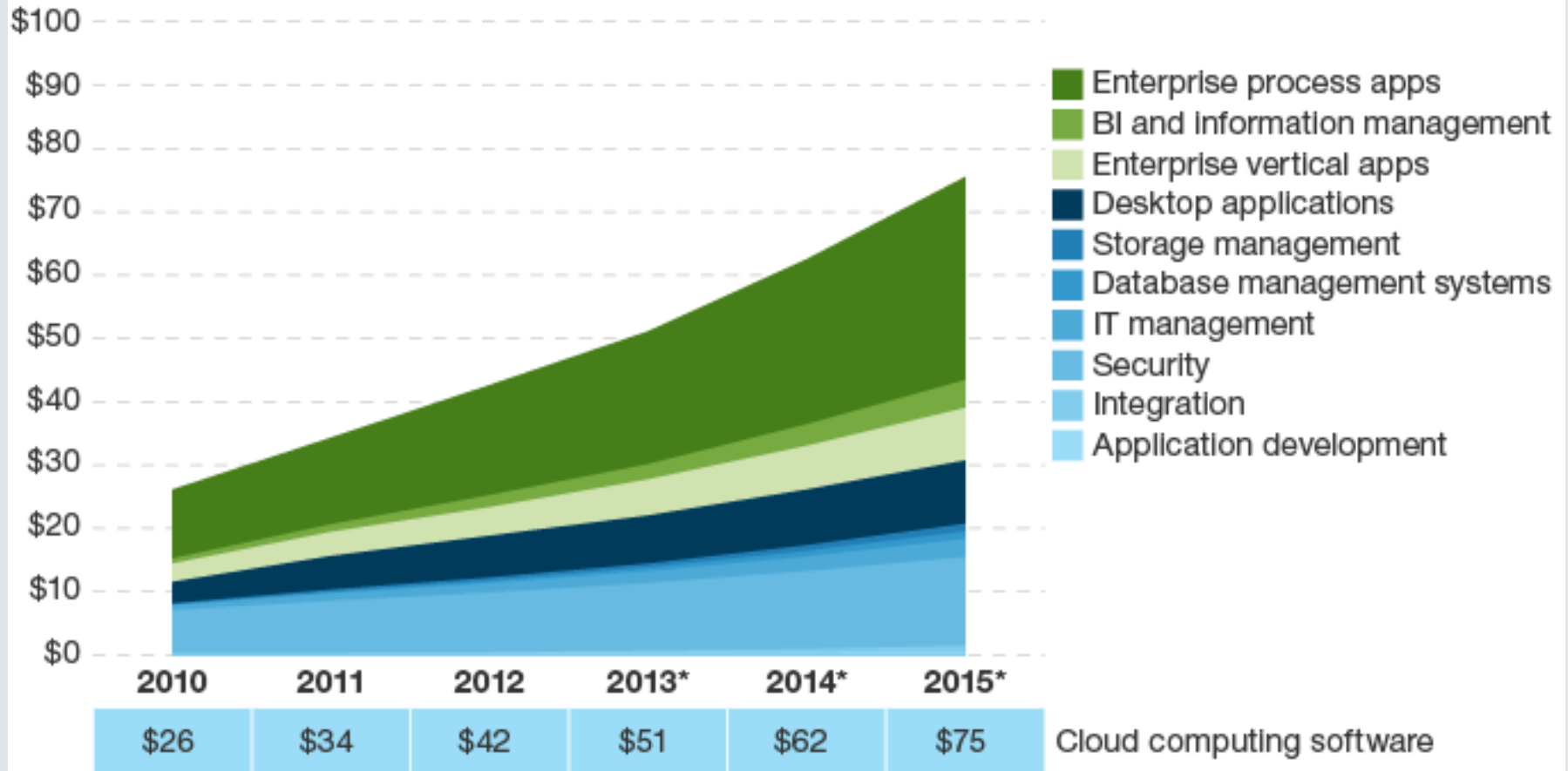
Global application markets by product, 2014*
(US\$ billions)



Apps, Analytics, And As-A-Service Are The Drivers Of Software Growth (Cont.)

10-3 | SaaS software will equal \$75 billion in 2015, with 22% growth in 2014 and 21% in 2015

SaaS software subscription revenue by category
(US\$ billions)

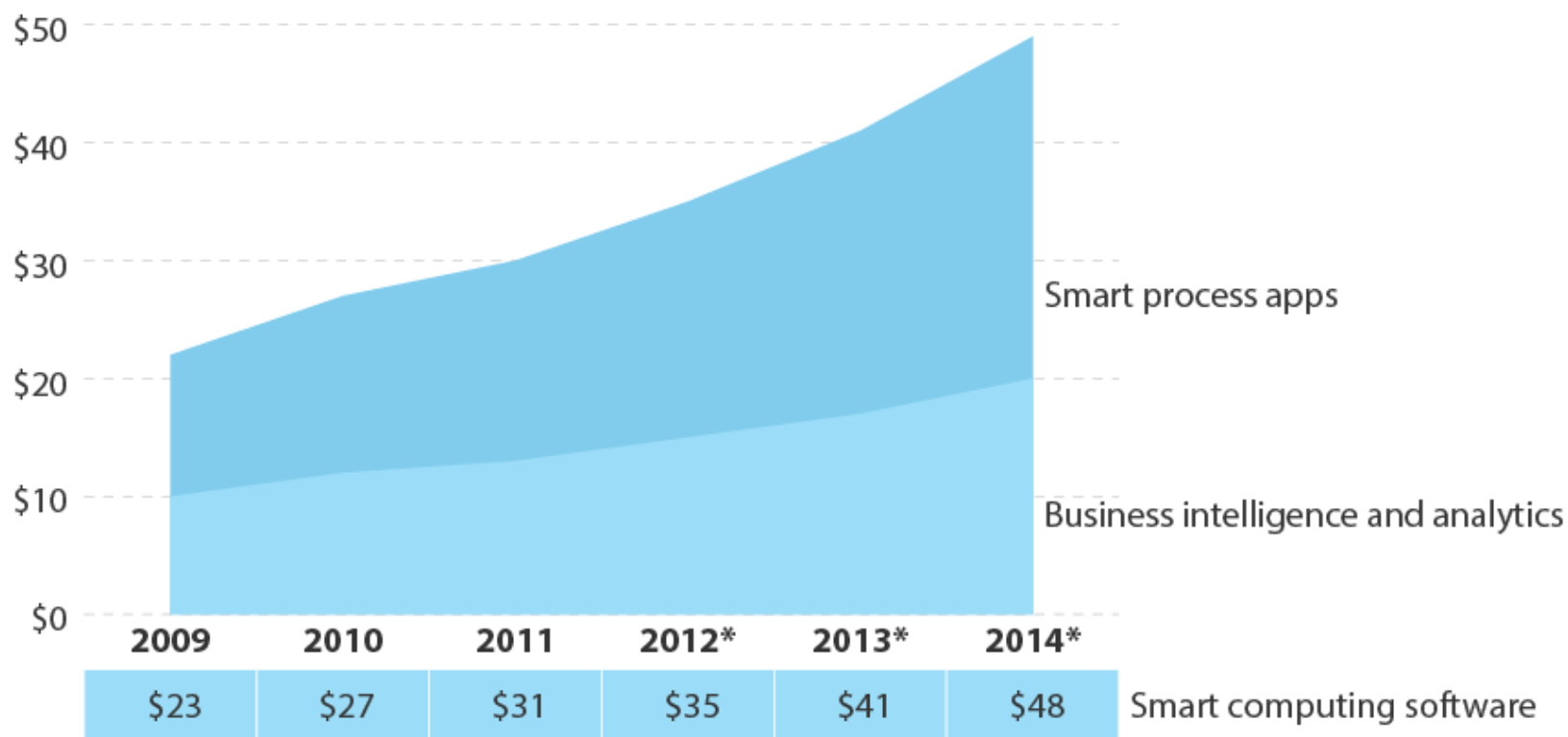


*Forrester forecast

Smart-приложения, ВІ и аналитика – лидеры роста рынка ПО

11-4 Smart process apps and analytics also outpace the software market

Global smart computing software market by category
(US\$ billions)

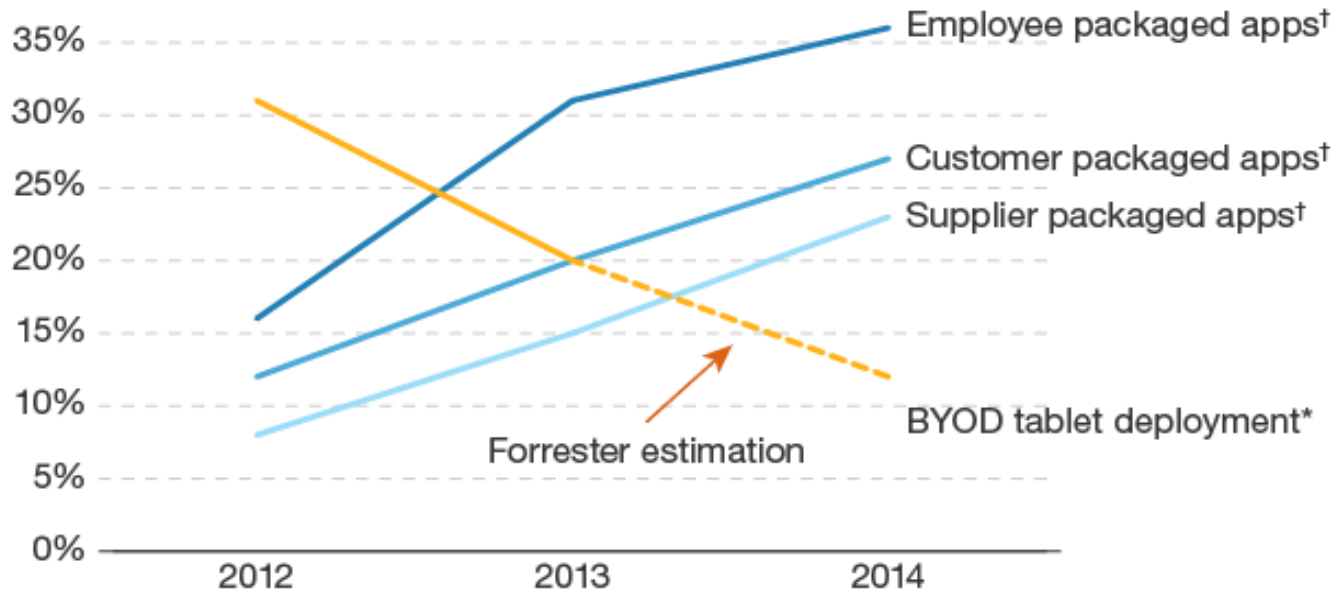


*Forrester forecast

BYOD стимулирует инвестиции в корпоративные приложения

 The spreadsheet associated with this figure contains additional data

Bring-your-own-tablet intensity compared with major corporate application investment



Base: *651 (2013) North American hardware decision-makers from firms with 20+ employees;

*738 (2012) North American hardware decision-makers from firms with 20+ employees;

†357 North American software decision-makers from firms with 20+ employees.

*Source: Forrsights Hardware Survey, Q3 2013 and Forrsights Hardware Survey, Q3 2012

†Source: Forrsights Software Survey, Q4 2013

Спасибо за внимание!

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