China Software Industry Report, 2013

Apr. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.

◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.

◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.

◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.

◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In recent years, Chinese software industry has shown steady progression as a whole, with the industrial scale expanding continuously, and there is a stably growing number of industrial players. In 2012, the software revenue of China reached RMB2.5 trillion, presenting a year-on-year rise of 32.7%, but down six percentage points against the figure last year.

In 2012, software services and networks developed rapidly, resulting in significant growth in the revenue of data processing and operations services. From January to December, the revenue was RMB 428.5 billion, up 41.5% year on year; the proportion reached 17.1%, 0.9 percentage point higher than that in the same period of last year.

With the stabilization of the manufacturing industry, the embedded system software has accelerated the development and achieved revenue of RMB 397.3 billion, up 31.2% year on year, 2.7 percentage points higher than the industry average. Promoted by favorable industrial policies, IC design achieved revenue of RMB 80.8 billion, up 25.5% year on year; the software product, system integration service and information technology consulting service grew steadily by 27.9%, 24.8% and 24.1% respectively.

Software Revenue and Growth Rate of China, 2008-2012 (Unit: RMB bn, %)
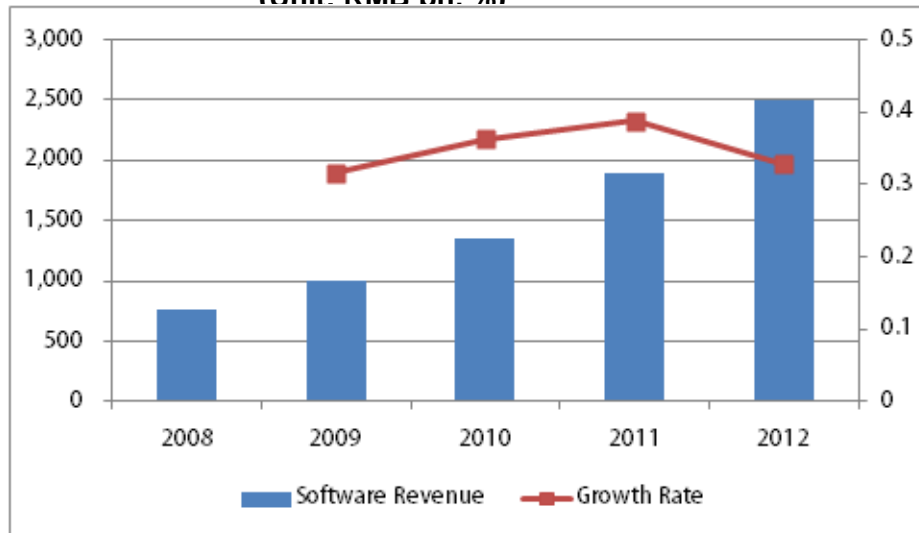
Source: MIIT; ResearchInChina *China Software Industry Report, 2013*

The Ministry of Industry and Information Technology issued the 12th Five-Year Plan on the Development of Software and Information Technology Service Industry, making clear the development strategies and goals in the 12th five-year period, and specifying 10 development priorities and eight major projects. According to industry estimates, by 2015, China's software industry revenue will exceed RMB 4 trillion, with an annual growth rate of more than 25%.

The report resolves around the followings:

Overview of Chinese software industry, involving policy support, market scale, corporate type, development status quo and future development tendency;

Market size and latest development characteristics of Chinese software outsourcing industry;

Market size, competition pattern, etc of Chinese management software market;

11 software outsourcing companies;

8 management software companies;

10 industrial application software companies;

15 other application software companies.

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