China Computer Software Industry Report, 2014-2017

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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 2013, China's software industry characterized the followings:

1. Software industry still maintained rapid development and some business segments stood out in terms of growth rate.

In 2013, China's software industry reported the revenue of RMB 3.1 trillion, jumping by 24.6% year on year, higher than global average of 5.7%. With respect to segments, software products, system integration & support services and data processing & operating services made up a large proportion of software business revenue, standing at 32.1%, 20.7% and 17.4% in 2013, respectively. In view of revenue growth rate, information technology consulting services and data processing & operating services kept growing fast in 2010-2013, with a CAGR of 39.2% and 35.3% separately. As the application of big data in all sectors accelerates, it is expected that data processing & operating services will take the lead in revenue growth.

2. Over 75% of revenue of software industry came from the Eastern region, while the revenue from the Northeastern and Western regions grew relatively fast.

In 2013, revenue of software business from the Eastern region accounted for 75.0% of the total, down 3.5 percentage points over 2009. During 2009-2013, the software industry witnessed relatively rapid growth in Northeastern and Western regions, with their CAGR reaching 43.2% and 42.6%, respectively, and revenue proportion trending up. In 2013, revenue from these two regions constituted 10.3% and 10.5% of the total, respectively.

3. Domestic and foreign companies accelerated their presence in cloud computing-related businesses.

In 2013, global giants Oracle and SAP stepped up their efforts to promote cloud computing-related businesses, while IBM, Microsoft and Amazon launched their cloud computing businesses in China. At the same time, Chinese IT giants Huawei, Lenovo and Internet giants Baidu, Alibaba, Tencent and Qihoo 360 all entered cloud market. Moreover, traditional software vendors also quickened their transformation to cloud service provider. For example, Yonyou positioned itself as a provider of software, cloud service and value-added services.

4. Technological innovations like SMAC will change business model of companies, thus creating new growth engines for software industry. In 2013, Technologies like (SMAC: social, mobile, analytic and cloud) began to change all walks of life (such as traditional retailing, banking, manufacturing, logistics and services) in the way of “being transboundary”, “integration” and “platform”. Spurred by new technologies, enterprise information system unveils the crucial stage to reconstruct computing platform and upgrade informatization mode, creating new growth points for software industry. Software companies scaled up their efforts to develop SMAC-related products and services. Take Neusoft Group for example, cloud platform SaCa developed by the company provides a series of sub-products to meet demands of mobile Internet, Internet of Things, social network, situational awareness, big data and cloud computing in B2B2C/G2B2C mode.

China Computer Software Industry Report, 2014-2017 by ResearchInChina highlights:

※ Operation of software industry in China (including software industry, segments, revenue from regional markets, software export, software outsourcing, competition pattern)

※ Cloud computing, big data and software industry (including definition, classification, market size, impact of cloud computing on software industry; definition, constitution, market size and impact of big data on software industry)

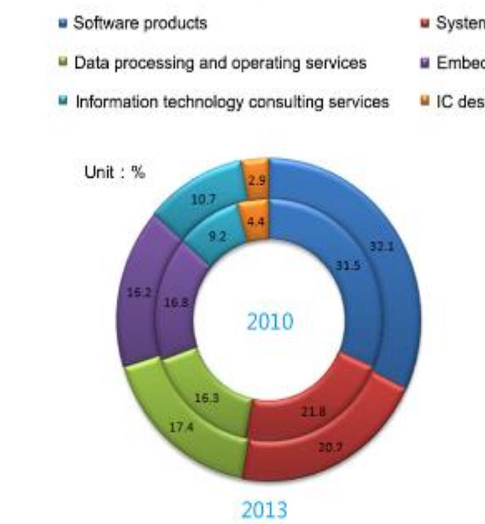
※ Cloud computing, big data and software industry (including definition, classification, market size, impact of cloud computing on software industry; definition, constitution, market size and impact of big data on software industry)

※ Operation of HPC software industry (including application of HPC, application software market of HPC, key companies in HPC industry)

※ Operation of key enterprise management software and application software companies (including profile, operating performance, revenue structure, gross margin, latest products and development strategy)

Revenue and YoY Growth Rate of China Software Industry, 2008-2017

Revenue Structure of Segmented Businesses in China Software Industry, 2013 vs.2010



The revenue from software products accounts for one-third of revenue, and the entire market tends to be stable. In 2013, software revenue made up

32.1%

The revenue from information technology consulting services and from data processing & operating services both maintained rapid growth, with the CAGRs at

39.2% and 35.3%

respectively during 2010-2013.

Source: China Computer Software Industry Report, 2014-2017 by ResearchInChina

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