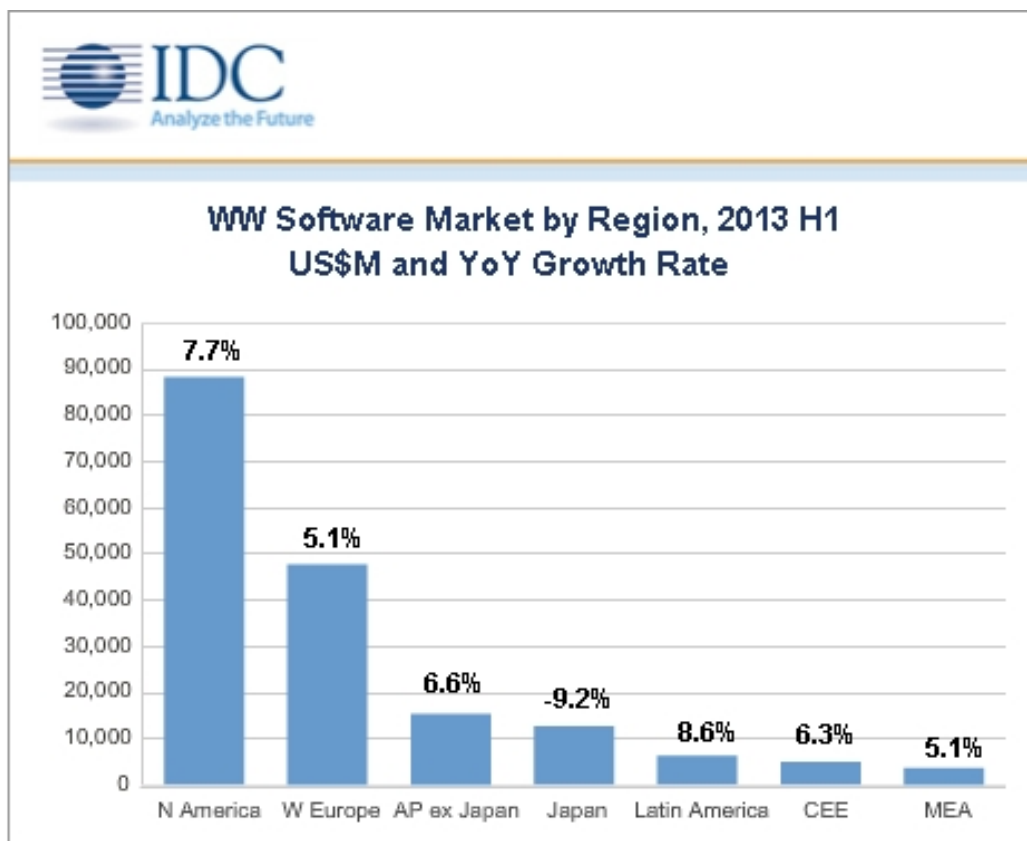


IDC on Enterprise Software Drivers

Written by Marco Attard
31 October 2013

What are the drivers of enterprise software growth? According to IDC the answer is Big Data/analytics, content applications and system software, as the global H1 2013 software market grows by 5.5% Y-o-Y to \$179 billion.

Such growth is higher (if slightly) than the 5.1% Y-o-Y experienced during H1 2012, and can be seen as a sign of recovery following the uncertainty caused by Eurozone turmoil, even if the W. European market remains slow with 5.1% Y-o-Y growth.



"Enterprises are seeing new opportunities to drive new and improved products and services by leveraging information," IDC says. "Therefore, it stands to reason that software to manage, access, and share information (structured and unstructured) continues to be a priority for competing in today's economy and a driver of software market growth,"

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The three segments making the software market as IDC sees it-- applications, application development & deployment (AD&D) and systems infrastructure software-- see H1 2013 growth of 5-6% Y-o-Y.

The applications market grows by 5.8%, thanks to "strong" gains in content and collaborative applications. Within the collaboration market, enterprise social network solutions are up by 28.3% Y-o-Y, making almost 13% of the entire category. Meanwhile CRM solutions reach "some stability" as recent product launches, content-collaboration support and digital marketing drive content applications.

Microsoft leads in applications, followed by SAP, Oracle, IBM and Intuit.

AD&D H1 2013 growth totals 5.1% Y-o-Y, slightly lower than the software overall, with the integration and process automation middleware and structured data management segments standing out with Y-o-Y growth of over 6%. The rise of Big Data and analytics drive structured data management (specifically through relational database management systems), as they do the growth in social usiness software markets on the applications side.

When it comes to vendors Oracle leads the AD&D market with 23.1% share, followed by IBM, Microsoft, SAP and SAS.

Systems infrastructure software grows by 5.1% Y-o-Y, with the system software segment growing by over 8% Y-o-Y thanks to the Windows 8 launch and cloud enablement solutions from the likes of VMware and Citrix. Microsoft owns 30.1% share of the market, followed by IBM, Symantec, EMC and VMware.

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