

Business Information Centre

Software

2010

Sources Available in the Business Information Centre



Market Research



Country Intelligence



Company Leads



Tender Opportunities



Useful Contacts

INTRODUCTION

It is important to keep up to date with what is happening in any industry in order to plan your company strategy effectively. The Business Information Centre can provide a wealth of information on all aspects of the software industry from the global industry as a whole to the more specific sub sectors.

In addition, Enterprise Europe NI is hosted by Invest Northern Ireland. The network can provide direct contact with market research centres throughout Europe and is a first point of contact for researching European software markets.

*This guide has been designed to assist with desk research and shows **examples** of reports and websites that might be useful. It is only possible to give an idea of the content of databases and websites. Invest NI does not endorse any of the websites or information providers mentioned.*

MARKET REPORTS

BUSINESS INSIGHTS (www.globalbusinessinsights.com)

Business Insights publish a range of strategic management, market analysis reports focusing on consumer goods, energy, finance, healthcare and technology. The following is a sample of the reports available through the Business Insights database for the software industry:

- Enterprise Technology Trends in 2010: The Top IT Trends affecting organizations in 2010 – Dec 2009 - Global
- The Future of Virtualisation: Emerging Trends and the Evolving Vendor Landscape – October 2009 - Global
- The Future of Software Delivery: The Opportunities and Challenges of Emerging Software Delivery Models – February 2009 – Global
- The Social Networking Market Opportunity: Quantifying Market Research, Scale & Monetization across the value chain, 2010 – 2015, Global
- The Top 10 Software Vendors: Positioning, Performance and SWOT Analysis - March 2008 – Global

BUSINESS MONITOR (www.businessmonitor.com)

Business Monitor provides Industry trend analysis and forecasts, and competitive intelligence on leading companies, covering 16 industries worldwide. The Business Information Centre has access to all this information for the Asian and Middle East markets. The following is a sample of the reports available through the Business Monitor database for the software industry:

- Broadband: Industry Forecasts – Internet – China – Q4 2009
- Information Technology Reports – Quarterly - 2010 for Australia, China, Hong Kong, Indonesia, Israel, Kuwait, Malaysia, Philippines, Qatar, Saudi Arabic, Singapore, South Korea, Sri Lanka, Thailand and UAE.
- Information Technology Reports – Annually – 2010 for Bahrain, Lebanon and Oman,
- IT/Computers: BMI Industry View - Singapore – Q4 2009
- IT/Computers: Industry Business Environment Overview – Asia – Q4 2009
- IT/Computers: Market Overview – Singapore – Q4 2009
- Market Data Analysis: Broadband – Australia - Q2 2010

DATAMONITOR (www.datamonitor.com)

Datamonitor reports provide comprehensive market intelligence, analysis and forecasting based on primary quantitative and qualitative research, providing the full picture on a particular industry, issue or trend. The following is a sample of the reports available through the Datamonitor database for the software industry:

- Business Process Management: Global Market Forecasts to 2014 (Interactive Model) – July 2009
- Business Trends: Retail Technology 2009 (Customer Focus) – February 2009
- Business Trends: Understanding Your Education Technology Customer 2008 (Customer Focus) – December 2008
- Emerging Alternatives to Chip and Pin to tackle card fraud in the US (Analyst Opinion) – August 2009
- Global Life Sciences IT Spending Forecast through 2014 (Interactive Model) - August 2009
- Identity and Access Management Products and Services to 2013 in Portugal, Finland, Austria, Denmark, Italy, Sweden, Ireland, Switzerland, Norway, UK, France, Germany, US and Spain
- Insurance Technology Spending Through 2014: Source Segmentation (Interactive Model), Jan 2010

- IT Applications: Global Market Forecast to 2013 (Interactive Model) - December 2009
- Open Source Software in the Enterprise Technology Market (Market Focus) – August 2009
- The Changing Role of Infrastructure Management (Concept Paper) – September 2009
- The Evolving SOA Platform – August 2009
- The Rise of MSLs Add a new twist to CRM (Analyst Opinion) – July 2009

The industry profiles below are available:

- Games Software 2009 in – Netherlands, South America, Asia Pacific, US, China, Japan, Spain, Germany, UK, Western Europe, France, Belgium, North America, Europe, Eastern Europe and Global
- Global Application Software – March 2010
- Global Home Entertainment Software – March 2010
- Global Internet Software and Services – March 2010
- Global Software and Services – March 2010
- Global Systems Software – March 2010
- Software 2009 in – Belgium, Spain, South Korea, Netherlands, Denmark, South Africa, Russia, Japan, India, Italy, Germany, US, Poland, UK, Brazil, Singapore, Norway, Taiwan, Sweden, France, Canada, Asia Pacific, China, Europe, Australia, Hungary, Global and Czech Republic

FROST & SULLIVAN (www.frost.com)

- Check Point “Software Blades”: Is it Evolution or Revolution? – Jan 2010
- Enterprise Application Software Market Overview & Trends – Oct 2009
- From Bolts to Bits: The Emergence of Taiwan Software & Services Industry, White Paper - Feb 2010
- World Web Based Clientless Remote Support Software Markets – Aug 2009
- World Software Based Pay TV Conditional Access Systems Market – April 2009
- World Web Conferencing On Premise Software Market – Nov 2009

GARTNER (www.gartner.com)

Gartner provides a detailed look at all aspects of the ICT industry worldwide. Comments on different issues are released on a continuous basis.

Product trends and analysis is performed through their hype cycles and competitor analysis is produced through their Magic Quadrants. Examples of information for the software sector include:

- **Software Applications**

Market dynamics, opportunities and threats for vendors in the key business applications software segments, including ERP, CRM, supply chain management, content/collaboration/e-learning, business intelligence and project portfolio management. Includes shipment, forecast and market share data.

- **Recent Cluster Research:**

- Market Focus: Open-Source Software, Worldwide, 2005 – 2010.
- Forecast: IT Operations Management Software, Worldwide, 2006 – 2011, update
- Forecast: Enterprise Software Markets, Worldwide, 2008 – 2013, 3Q, 2009 Update
- Forecast: Enterprise Software Markets Poised for Recovery in 2010, March 2009
- Forecast: Open-Source Impact on Infrastructure Software, Worldwide and Regional, 2007 – 2012
- Forecast: Storage Management Software, Worldwide 2007 – 2012, Update
- Market Trends: Asia/Pacific ERP, SCM and CRM Software will have Double Digit CAGR, 2008 - 2013

- **Hype Cycles:**

A Hype Cycle is a graphic representation of the maturity, adoption and business application of specific technologies. Please find listed below some software hype cycles:

- Hype Cycle for Open-Source Software 2009
- Hype Cycle for Social Software 2009
- Hype Cycle for Software as a Service 2009
- Hype Cycle for Storage Software Technologies 2009
- Hype Cycle for Wireless Devices, Software and Services 2009

- **Magic Quadrants and MarketScopes:**

Magic Quadrants and MarketScopes offer visual snapshots of a market's direction, maturity and participants. Please find listed below some software magic quadrants and marketscopes:

- Data Centre Outsourcing and Utility Services Europe – April 2010

- Enterprise Wireless E-Mail Software Market – May 2009
- Integrated Software Quality Suites – July 2009
- Key Issues for Open-Source Software, 2010
- Multiregional Card Management Software – May 2009
- Price Optimisation and Management Software for B2B – July 2009
- Secure Email Gateways – April 2010
- Shared Account/Software-Account Password Management – June 2009

KEYNOTE (www.keynote.co.uk)

Keynote is an online database providing information on 27 industry sectors in the UK. Reports cover industrial and consumer sectors and information includes market size and trends, key players and company profiles. The following is a sample of the reports available through Keynote for the software industry:

- Contact Centres 2010
- Digital Communications 2009
- Market Forecasts: IT, Telecommunications & Security 2009

MINTEL (www.mintel.com)

Mintel market reports analyse market sizes and trends, market segmentation and consumer attitudes and purchasing habits, as well as assessing the future market. The following is a sample of the reports available through Mintel for the software industry:

- Business Computing (Industrial Report), UK, February 2009
- Call Centres (Industrial Report), UK, February 2009
- Digital Trends Spring, UK, March 2010
- E-Commerce, UK, February 2010
- ICT Software (Industrial Report), Ireland, June 2009
- Internet Quarterly, UK, June 2009
- Technology Buying in the Recession, UK, June 2009

PLIMSOLL (www.plimsoll.co.uk)

Plimsoll specialises in providing up to date, authoritative financial analysis. They publish in-depth industry reports and market analysis on over 1500 UK industries. The following is a sample of the reports available through Plimsoll for the software industry:

- Accounting Software, 2010
- Accounts Software Resellers, 2010

- Analysis Software, 2010
- Automation Software, 2010
- Computer Software, 2010
- Computer Software Top 500, 2010
- Database Software, April 2010
- E-Business Software & Solutions, 2010
- Educational Software, 2010
- Engineering Software, 2010
- EPOS Software & Systems, 2010
- Financial Software, 2010
- Freight Software Suppliers, 2010
- Healthcare Software, 2010
- Hotel Management Software, 2010
- Independent Software Companies, 2010
- Label Software, 2010
- Legal Software, 2010
- Logistics Software, 2010
- Manufacturing Software, 2010
- Multimedia Software, 2010
- Networking Software, 2010
- Payroll & H R Software, 2010
- Programming Software, 2010
- Software Developers, 2010
- Software Publishing, 2010
- Telecommunications Software, 2010

SNAPDATA (www.snapdata.com)

Snapdata provide market research overviews for a wide range of markets, indicating statistics for market size, shares, distribution and forecasts. The following reports are available for the software industry:

- Australia Games Software 2009
- China Games Software 2009
- China Software 2009
- France Games Software 2009
- UK Application Software 2008
- UK Games Software 2008
- UK Software 2008
- US Games Software 2009

UK TRADE & INVESTMENT (www.uktradeinvest.gov.uk)

UKTI has extensive research contacts in every sector, in every country. They also publish research on their website. The following reports are a sample of what is available for the software industry:

- ICT Sector in Hong Kong and Macao – September 2009
- ICT Sector in Japan – October 2009
- Software, Computer Services and Electronics in India – Oct 2009

OTHER

Hardcopy resources in the Information Centre:

- Computing Market Intelligence IT Software 2010

Some Management Consultants specialise in different sectors and make detailed research available on their websites. Those with research available on the software sector include:

- KPMG Global – Electronics, Software and Services
<http://www.kpmg.com/Global/en/WhatWeDo/Industries/Electronics-Software-Services/Pages/default.aspx>
- Deloitte Global – Technology, Media & Telecommunications –
http://www.deloitte.com/dtt/section_node/0,1042,sid%253D41524,00.html
- Ernst & Young, Technology Industry Focus –
<http://www.ey.com/GL/en/Industries>
- Accenture, Electronics & High Tec –
http://www.accenture.com/Global/Research_and_Insights/By_Industry/Electronics_and_High_Tech/default.htm
- PWC Global – Technology –
<http://www.pwc.com/gx/en/technology/index.jhtml>

COMPANY INFORMATION

Identifying companies and finding the right information about their activities and performance is essential to making good business decisions. The Information Centre has a wide range of company databases that can provide financials, product information, company details or trade names. Company information on agents or distributors, competitors or even potential customers, can be searched for on an international, regional, national or local level through a variety of databases including Kompass and FAME.

Some of these databases have free, limited searching available on the internet. This can help to identify potential companies which can be researched further. The following links are useful:

- Bureau Van Dijk – Free Directory - www.bvdep.com
- Kelly's Directory – www.kellysearch.com
- Kompass – www.kompass.com

Datamonitor supplies company profiles on the larger global corporates inc, Commtouch Software Ltd, Maximizer Software Inc. and Absolute Software Corporation. These profiles provide an invaluable analysis into the competitive and strategic performance of the company.

STATISTICS

The National Statistics website, www.statistics.gov.uk, holds information on import and export trade statistics for many products:
<http://www.statistics.gov.uk/OnlineProducts/>

Datamonitor also provides details on statistics and forecasts.

ASSOCIATIONS

Associations are an extremely useful way to find information on either markets or companies within the software sector. Many associations hold detailed membership directories and may also include detailed market reports, statistics, events and industry news. They also provide useful links to further information. Associations in the software sector include:

NORTHERN IRELAND

- Momentum - www.momentumni.org

IRELAND

- ICT Ireland - www.ictireland.ie/
- Irish Software Association - www.software.ie

UK

- British Software Alliance - www.bsa.org/country.aspx?sc_lang=en-GB
- Business Application Software Developers Association - www.basda.org
- Entertainment and Leisure Software Publishers Association (ELSPA) - www.elspa.com
- Intellect - www.intellectuk.org
- ScotlandIS - www.scotlandis.co.uk

EUROPE

- European ICT Association - www.eicta.org/
- European Internet Foundation - www.eifonline.org/
- European Software Association - www.europeansoftware.org/
- European Telecommunications Network Operators Association - www.etno.be/

INTERNATIONAL

- International Association of Software Architects - www.itarchitect.co.uk/iasa/
- International Game Developers Association - www.igda.org
- International Software Process Association - <http://users.ece.utexas.edu/~perry/prof/ispa/>
- Business Software Alliance - www.bsa.org/uk/
- Business Software Association of Australia - www.bsaaustralia.com.au/bsaaweb/main/index.php?SID=LeYnpwIPjRwEDCfP&loc=1
- China Software Industry Association - www.csia.org.cn/home/index/index.htm
- Information Technology Association of America - www.itaa.org/
- National Association of Software and Service Companies - www.nasscom.in
- New York Software Industry Association - www.nysia.org
- Software and Information Industry Association - www.sii.net
- The Computing Technology Industry Association - www.comptia.org/
- The Entertainment Software Association - www.theesa.com/

Invest NI is not responsible for the content of external websites and inclusion in, or exclusion from, the above list does not imply recommendation, endorsement or otherwise of any company, product or service.

NEWS

Business Information Centre subscribes to a number of news databases which provide access to articles, news and trade sources.

A vast amount of current and retrospective News articles on the industry can also be obtained from Datamonitor and Mintel.

The Lexis Nexis database has access to trade and news sources from around the world.

JOURNALS HELD IN THE INFORMATION CENTRE:

- Computer Scope
- GC – Government Computing Magazine
- Information World Review
- Irish Computer Channels
- Technology Ireland

INTERNET

The internet holds an extensive range of information on software and related industries. Useful sites include:

- **ASC Software Register** - www.asc.org.uk/Register/
Register of useful software packages with a detailed analysis of each and supplier details.
- **Business Software Alliance** - www.bsa.org/eupolicy
Policy environment for the software industry.
- **Department for Business, Enterprise & Regulatory Reform** - www.berr.gov.uk/sectors/index.html
Profile of the software industry in the UK looking at key issues concerning the sector and providing access to a searchable company database.
- **Enterprise Ireland** - www.enterprise-ireland.com
This site provides a detailed sector profile on the software industry in Ireland. It also has access to a supplier database.
- **India One Stop** - <http://indiaonestop.com/listings-service-infotech.htm>
Links to software Technology Parks and range of Indian IT firms.
- **European Software Institute** - www.esi.es
This site provides news, research and projects within the software field.
- **Northern New Media Forum** - www.nnmf.org
Membership forum of over 200 companies and individuals including software houses; web site design companies; graphic artists; ISP's and learning content providers.
- **Ovum** - www.ovum.com
This site provides very useful up-to-the minute news articles on the software industry in the UK.

- **Network European Software & Services Initiative** – www.nessi-europe.com
European Technology Platform dedicated to Software and Services
- **Scottish Enterprise** - www.scottish-enterprise.com
This website holds a wealth of information on eBusiness and has a searchable database of suppliers in Scotland.
- **SDForum** - www.sdforum.org
Software Development Forum is a member-governed, independent, non-profit organisation.
- **Software Engineering Institute** - www.sei.cmu.edu/sei-home.html
The Software Engineering Institute is research and development centre which aims to help with improvements in software engineering capabilities.
- **Software Industry Research** - www.qub.ac.uk/nierc/Themes/software.htm
Programme of research into the software industry in the UK.
- **Software Industry Sector** - www.softwarecenter.cmu.edu
This site investigates emerging trends in the economics, technology and management of the global software industry. It looks at software development practices and provides access to research publications, newsletters and working papers.
- **The Apache Software Foundation** - www.apache.org
Support for the Apache community of open-source software projects.
- **The Irish ICT Network** - www.irishdev.com/
Aim to become the primary communications channel to the estimated 15,000 developers in Ireland, and they currently have over 1,650 members.

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SELLING TO THE PUBLIC SECTOR

Enterprise Europe (NI)'s Public Procurement Service (TED), offers the following services to subscribing businesses:

- Daily alerting service matching tender opportunities to tailored company profiles
- Advice and assistance on tendering procedures
- Information on UK and EU public procurement regulations
- Assistance and advice on supplying to local government, education boards, the health sector and utility companies
- Information on where to access tender opportunities below EC thresholds
- Advice on how to find public tenders on the internet

In addition to the TED service, a number of resources for the Public Procurement market are available through Enterprise Europe (NI).

For more information, please find attached a link into the 'Tender Information' section on the Invest NI website:

www.investni.com/tenderinformation

EXHIBITIONS/TRADESHOWS

Exhibitions/Tradeshows are a good way to market your product, finding out who your competitors are, networking and finding new customers. To find out about exhibitions and tradeshows in the software sector, worldwide or locally, just click on the links below:

www.exhibitions.co.uk/

www.expodatabase.com/messedb/

RELATED LINKS

These sector guides along with others can be found on the Invest NI website:

www.investni.com/index/publicationsa-z.htm?filter=S

These are only examples of information available for the industry. If you require anything specific or have any questions, please do not hesitate to contact Kathy McConville, 028 9069 8127 or any member of Business Information Centre team by e-mail: bic@investni.com.

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