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India Information Technology Report Q1 2016

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Abstracts

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BMI View: India's IT market is a regional laggard, as low incomes have stymied PC market development, leaving it far behind China, a situation that is similar in terms of enterprise IT spending. The medium-term outlook is however much improved compared to the past decade, with our household income growth forecast illustrating the potential for retail hardware vendors to capitalise on a massive deepening of the market as disposable incomes for around 50mn households pass our threshold for PC market participation.

This must however be considered in the context of a high degree of price sensitivity - as well as a greater level of competition from other device categories than when East Asian economies passed through similar developmental stages. We also believe there to be the foundations for enterprise IT spending outperformance in India over 2016-2019 due to modernisation initiatives and a more coherent and predictable policy environment encouraged by the government. These factors underpin our bullish growth forecast for India's IT market, with a CAGR of 11.3% envisaged for 2015-2019.

Latest Updates And Industry Developments

Computer Hardware Sales: INR1.5trn in 2016 to INR2.0trn in 2019. Tablet and notebook volume growth will drive overall hardware spending growth as huge numbers of households acquire the income to buy PCs for the first time, but we caution that price sensitivity will remain high, limiting vendor margins.

Software Sales: INR308.3bn in 2016 to INR434.7bn in 2019. Increase supply of cloud services will expand the market to underpenetrated SMEs through lower cost and more flexible solution provision, while verticals such as financial

services will drive spending in higher value complex solutions.

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