

India Information Technology Report Q2 2016

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Abstracts

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BMI View: We have a bullish outlook for India's IT market over the medium term based on a combination of a strong economic growth forecast, particularly rising household incomes and the low penetration rates for devices and solutions. The retail hardware market is expected to deepen considerably, which will drive PC volume growth, while also indirectly supporting enterprise investment in software and services through strong sentiment. The opportunity in India is large, even compared to other emerging markets in APAC, with much lower penetration rates, making it stand out as a medium-term growth prospect - and even beyond 2020. We forecast an IT spending CAGR of 11.0% over 2016-2020 to almost INR3.6trn in 2020.

Latest Updates And Industry Developments

Computer Hardware Sales: INR1.1trn in 2016 to INR1.7trn in 2020, corresponding to a CAGR of 8.3%. Rising incomes the foundation for robust medium term outlook, with further upside if computer hardware incentives are extended under the 'Make In India' initiative.

Software Sales: INR310bn in 2016 to INR484bn in 2020, a CAGR of 11.8%. Underpenetrated market will be deepened by supply of cloud services, with huge potential in the SME segment, and verticals such as financial services will be lucrative for vendors of more complex solutions.

IT Services Sales: INR837bn in 2016 to INR1.4trn in 2020. The services market has strong momentum and will be supplemented by the fast-expanding market for Internet of Things smart services over the medium term.

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