

India Information Technology Report Q3 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 in terms of rising household incomes - and the low penetration rates for devices and solutions. The retail hardware market will deepen markedly, driving PC volume growth, while also indirectly supporting enterprise investment in software and services. We forecast IT spending CAGR of 11.0% over 2016-2020 to almost INR3.6trn.

Latest Updates And Industry Developments

Computer Hardware: INR1.2trn in 2016 to INR1.7trn in 2020, corresponding to a compound annual growth rate (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: INR310bn in 2016 to INR484bn in 2020, corresponding to a CAGR of 11.8%. An underpenetrated market will be deepened by supply of cloud services, with huge potential in the smalland- medium-sized enterprise segment, and verticals such as financial services will be lucrative for vendors of more complex solutions.

IT Services: INR837bn in 2016 to INR1.4trn in 2020, corresponding to a CAGR of 14.3%. Strong momentum will be supplemented by the fast-expanding market for Internet of Things smart services over the medium term.

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