

India Information Technology Report Q4 2015

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Abstracts

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BMI View: With the exception of its role as an outsourcing hub, India's IT market development trails far behind fellow Asian giant China on virtually all metrics. However, India's position as a regional laggard, but one with a robust economic outlook and an improving business environment, means its relatively undeveloped status translates into great growth potential over the medium term. This could see it become a regional outperformer, although issues such as inequality, weak infrastructure and patchy education levels outside major urban areas will still limit India's ability to close the gap to China. As a result of these factors we maintain our robust growth forecast for India's IT market, with a CAGR of 11.7% forecast 2015-2019.

While the outlook is bullish, we maintain our view that the extreme level of inequality and poverty in India will ultimately be a brake on IT spending growth.

Headline Expenditure Projections

Computer Hardware Sales: INR1.37trn in 2014 to INR1.47trn in 2015, +7.9% in local currency terms. Notebook volume growth has overtaken tablet sales as the primary growth driver, but tablet growth momentum expected to slowly return from 2015 after the market adjusted to the initial rapid diffusion of ownership in the core market in 2014.

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