

Indonesia Information Technology Report Q2 2016

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Abstracts

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BMI View: Indonesian IT spending was hit by regional economic uncertainty and rupiah depreciation, while the hardware segment was worst affected and contracted in local currency terms as import taxes acted as an additional drag. This does however mean there is pent-up demand and as the economic backdrop becomes more supportive we expect IT spending to move to a faster growth trajectory. We forecast Indonesian IT spending will grow at a CAGR of 10.9% 2016-2020 to reach a total of IDR232.4trn in 2020. We believe retail hardware will be a high growth market in the later years of our forecast as rupiah appreciation and broad-based household income growth will have a positive impact on affordability, as illustrated in the chart below - while enterprise software and cloud computing demand also present strong growth opportunities for vendors.

Latest Updates & Industry Developments

Computer Hardware Sales: IDR77.8trn in 2016 to IDR112.9trn in 2020, at a compound annual growth rate (CAGR) of 8.3% in local currency terms. Depreciation remains a squeeze on affordability in 2016, but the medium-term outlook is bright based on income growth that will deepen the market and ease price sensitivity in the middle class.

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