

Indonesia Information Technology Report Q3 2016

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Abstracts

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BMI View: As a market that is highly dependent on imported products and solutions, Indonesian IT demand was hit by regional economic uncertainty and rupiah depreciation in 2015, with the hardware segment worst-affected as import taxes added to the reduction in affordability. We expect conditions to begin to improve from 2016, and forecast Indonesian IT spending will grow at a CAGR of 12.2% over 2016-2020 to reach a total of IDR232.4trn in 2020. Rupiah stabilisation and then appreciation will help boost affordability, while rising household income and enterprise modernisation and economic development will support software and services demand growth.

Latest Updates & Industry Developments

Computer Hardware Sales: IDR77.78trn in 2016 to IDR112.94trn in 2020, at a compound annual growth rate (CAGR) of 9.8% in local currency terms. Impact of import taxes adds uncertainty, but medium term trend of domestic purchasing power growth should outweigh this downside and drive spending higher.

Software Sales: IDR25.98trn in 2016 to IDR40.43trn in 2020, at a CAGR of 11.7% in local currency terms. Cloud service delivery is driving the market forward by deepening the market to the large pool of Indonesian small- and medium-sized enterprises and drive spending growth higher.

IT Services Sales: IDR43.00trn in 2016 to IDR79.01trn in 2020, at a CAGR of 16.4% in local currency terms. Strong growth in cloud services and outsourcing adoption, and a deepening of the broader market as informatisation of enterprises and government increases, will drive services outperformance.

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