

Malaysia Information Technology Report Q1 2016

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Abstracts

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BMI View: After a challenging 2015, when ringgit depreciation and wider economic uncertainty held back IT market growth, we expect the Malaysian IT market to move to a stronger growth trajectory over the medium term, with a CAGR of 5.1% over 2016-2019 in local currency terms. In the hardware market, rising incomes and increased access to affordable data connectivity will boost consumer spending in volume terms and through an easing of price sensitivity. Meanwhile, in the enterprise software and services market growth will be robust, with cloud computing and Internet of Things application adoption identified as areas of outperformance. The majority of spending will however continue to be derive from more traditional solutions that offer cost efficiencies that enable local enterprises to respond to to heightened competition across South East Asia.

Latest Updates And Industry Developments

Computer Hardware Sales: MYR9.8bn in 2016 to MYR10.8bn in 2019, a compound annual growth rate (CAGR) of 2.7%. Ringgit stabilisation in 2016, and then income growth over 2016-2019, will deepen the market, as well as offering vendors higher margin opportunities as price sensitivity eases.

Software Sales: MYR4.5bn in 2016 to MYR5.7bn in 2019, a CAGR of 6.0%. Cloud computing software delivery has the potential to deepen the application market to Malaysian small- and medium-sized enterprises and accelerate market growth.

IT Services Sales: MYR7.2bn in 2016 to MYR10.0bn in 2019, a CAGR of 7.7%. IT services spending forecast to outperform through wider adoption of

outsourcing, cloud computing and Internet of Things applications by enterprises.

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