

# Malaysia Information Technology Report Q2 2016

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## Abstracts

Includes 3 FREE quarterly updates

**BMI View:** Malaysia's IT market has medium-term potential as incomes rise and the economy continues to develop, creating growth opportunities in the retail and enterprise markets. We identify income gains for Malaysia's middle class 2017-2020 as the stand-out opportunity, directly through potential for easing price sensitivity in the PC market, and indirectly through the impact on enterprise sentiment. In contrast to the medium-term outlook, we have a mixed growth forecast for 2016 as regional economic uncertainty and further ringgit depreciation against the US dollar will squeeze growth, but still a significant improvement from 2015 when the hardware segment was hit hard by a combination of depreciation and the introduction of the Goods and Services Tax in April. We forecast total IT spending will increase at a CAGR of 6.8% 2016-2020 to MYR26.3bn in 2020.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** MYR9.0bn in 2016 to MYR10.6bn in 2020, a compound annual growth rate (CAGR) of 4.2%. A more supportive economic environment and a shift in product cycle dynamics will see the hardware segment regain momentum and growth both in value and volume terms.

**Software Sales:** MYR4.4bn in 2016 to MYR5.9bn in 2020, a CAGR of 7.7%. Enterprise modernisation will broadly support software spending, while cloud computing software delivery has the potential to deepen the application market to Malaysian small- and medium-sized enterprises.

**IT Services Sales:** MYR6.8bn in 2016 to MYR9.8bn in 2020, a CAGR of 9.5%. IT services spending forecast to outperform through wider adoption of

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

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