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Malaysia Information Technology Report Q4 2016

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Abstracts

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BMI View: Malaysia's IT market has considerable growth potential throughout the medium term, with opportunities weighted towards software and services, where enterprise demand is expected to be strong. Meanwhile, the hardware segment has a mixed outlook due to increased threat of smartphones cannibalising retail PC sales. Even so, the market will be much stronger in the medium term than it was in 2015,when IT hardware spending declined sharply due to the combination of ringgit depreciation and the introduction of the Goods and Services Tax. We forecast total IT spending will increase at a CAGR of 5.7% throughout 2016-2020 to MYR24.4bn in 2020.

Latest Updates & Industry Developments

Computer Hardware Sales: MYR8.5bn in 2016 to MYR9.6bn in 2020, a compound annual growth rate (CAGR) of 3.0%. Outlook downgraded in Q4 update as tablet demand cannibalisation by smartphones escalated with a further decline in PC sales in H116 reported by local retailers.

Software Sales: MYR4.3bn in 2016 to MYR5.6bn in 2020, a CAGR of 6.6%. Large enterprise and SME software investment outlook is strong, respectively underpinned by complex solution demand and cloud availability.

IT Services Sales: MYR6.7bn in 2016 to MYR9.2bn in 2020, a CAGR of 8.4%. Increasing adoption of outsourcing, cloud computing and Internet of Things applications by enterprises support a strong segment forecast.

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