

Philippines Information Technology Report Q2 2016

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Abstracts

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BMI View: The Philippines IT market is forecast to maintain a trend of strong growth over the medium term based on the supportive economic environment. We envisage a CAGR of 10.2% over 2016-2020 to a total value of PHP314.1bn in 2020, making the Philippines an outperforming market in the Asia Pacific alongside other markets with relatively low exposure to depressed commodities markets such as Vietnam and India. A trend of rising household incomes will support a deepening of the retail market, while the expanding middle class increases the scope for wider margins to vendors. This economic trend will also result in buoyant enterprise confidence that will boost spending on software and services. While the core scenario is bullish, we caution that the Philippines is not immune to regional economic uncertainty, and the potential for a hard landing in China is a significant downside risk.

Latest Updates & Industry Developments

Computer Hardware Sales: PHP109.2bn in 2016 to PHP151.2bn in 2020 at a compound annual growth rate (CAGR) of 8.0%. Our bullish household income outlook underpins our view for a deepening of the PC market and easing price sensitivity in the middle class to drive IT hardware spending growth.

Software Sales: PHP30.7bn in 2016 to PHP50.1bn in 2020 at a CAGR of 11.5%. The ongoing modernisation of Philippine enterprises will create new avenues for software vendors, while lower-cost software-as-a-service solutions have the potential to deepen the market to a greater number of small- and medium-sized enterprises.

IT Services Sales: PHP69.8bn in 2016 to PHP112.7bn in 2020 at a CAGR of

12.8%. We expect the growth momentum of the business process outsourcing and cloud computing markets will ensure IT services growth outperformance extends over the medium term

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