

Philippines Information Technology Report Q3 2016

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Abstracts

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BMI View: A strong economic outlook, and specifically a migration of households up the income scale, are expected to add momentum to the Philippine IT market over the medium term and we forecast a CAGR of 10.6% over 2016-2020 to a total value of PHP314.08bn in 2020. We consider the Philippines to have the potential to outperform in the Asia Pacific alongside other markets with relatively low exposure to depressed commodities markets such as Vietnam and India. We also have a positive assessment of industry development potential, particularly for business process and software development outsourcing, but the electronics industry has a slightly less bright outlook.

Latest Updates & Industry Developments

Computer Hardware Sales: PHP109.16bn in 2016 to PHP151.23bn in 2020 at a compound annual growth rate (CAGR) of 8.5%. Purchasing power gains by households envisaged over the medium term is the foundation for our computer hardware market outlook, where a deepening of the PC market and easing price sensitivity in the middle class should be targets for vendors.

Software Sales: PHP30.69bn in 2016 to PHP50.13bn in 2020 at a CAGR of 13.0%. 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: PHP69.79bn in 2016 to PHP112.72bn in 2020 at a CAGR of 12.7%. We expect the enterprise adoption of outsourcing and cloud computing will gather pace, while government service modernisation will be another source

of opportunity.

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