

Singapore Information Technology Report Q3 2016

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Abstracts

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BMI View: Singapore is a high-value domestic market for IT products and solutions and a major producer of electronics, software and services. We believe its hub status will support growth in software and services spending and industry performance over the medium term, particularly for advanced solutions such as cloud computing and the Internet of Things, where Singapore's supportive policy environment, strong network infrastructure and high value enterprise mix are all positives. Meanwhile, domestic hardware spending faces the limits of device saturation, and the local industry will continue to be challenged by lowcost production centres in APAC. We expect total IT spending will increase at a CAGR of 3.4% over 2016-2020 to SGD8.8bn in the final year of our forecast.

Latest Updates & Industry Developments

Computer Hardware Sales: Forecast to increase from SGD2.6bn in 2016 to SGD2.6bn in 2020, a CAGR of 0.7%. High incomes and replacement spending make for a lucrative market in per capita terms, but retail PC market saturation and erosion of enterprise infrastructure spending due the shift to the cloud present downside.

Software Sales: Forecast to increase from SGD1.5bn in 2016 to SGD1.8bn in 2020, a CAGR of 4.1%. High-value enterprise, particularly the large financial sector, is a key source of demand for high value complex software solutions, and is expected to drive medium term growth.

IT Services Sales: Forecast to increase from SGD3.6bn in 2016 to SGD4.4bn in 2020, a CAGR of 4.9%. Traditional services sales to be flat, but cloud computing

and Internet of Things more than offset core market maturity in our growth scenario.

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