

# Singapore Information Technology Report Q4 2016

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## Abstracts

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**BMI View:** The high-value makeup of Singapore's IT market makes it lucrative, but there is a corresponding lack of growth potential due to the high penetration of devices and solutions. This is particularly true of the hardware segment where the PC market is saturated, and the outlook has weakened as tablet demand is cannibalised by the phablet. Singapore does still have growth potential, for instance in cloud computing and Internet of Things solutions, where its high-value enterprise mix, supportive policy environment and regional hub status are conducive to the adoption of the latest technologies. We expect that total IT spending will increase at a CAGR of 2.4% over 2016-2020 to SGD8.1bn in the final year of our forecast.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** Forecast to decrease from SGD2.4bn in 2016 to SGD2.3bn in 2020, a CAGR of -0.3%. Downgraded outlook in Q416 due to weaker outlook for tablet sales, which are being cannibalised by the popularity of phablets.

**Software Sales:** Forecast to increase from SGD1.5bn in 2016 to SGD1.7bn in 2020, a CAGR of 3.1%. Large financial sector and Singapore's regional hub status make it a lucrative market and growth potential still exists in areas such as data analytics.

**IT Services Sales:** Forecast to increase from SGD3.5bn in 2016 to SGD4.0bn in 2020, a CAGR of 3.9%. Core market has limited growth potential, but cloud computing and Internet of Things will drive segment outperformance.

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