

Sri Lanka Information Technology Report Q4 2016

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Abstracts

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BMI View: Sri Lanka has huge potential as one of the APAC markets with the lowest penetration rates for hardware, software and services - along with a robust economic outlook. We believe this will enable spending to increase at a CAGR of 12.1% over 2016-2020 to a total of LKR167.8bn in 2020. There is however some downside to the low level of development, for instance, price sensitivity will be high and this could limit profitability, while in the hardware segment there is increasing concern for PC vendors that large numbers of consumers could bypass the PC era and become accustomed to smartphones as their sole computing devices.

IT Hardware Sales: LKR66.4bn in 2016 to LKR95.1bn in 2020, a compound annual growth rate (CAGR) of 9.4% in local currency terms. Downgraded outlook in Q416 due to negative impact of smartphones on tablet sales, but income growth momentum will still be a boost for overall PC sales.

Software Sales: LKR17.8bn in 2016 to LKR30.9bn in 2020, CAGR of 14.7%. As supporting infrastructure investments allows for increased supply, we expect software-as-a-service will deepen the enterprise software market, along with the upside through reduced piracy.

IT Services Sales: LKR22.1bn in 2016 to LKR41.8bn in 2020, CAGR of 17.3%. There is growth potential in basic services as computerisation levels increase in the public and private sectors, while adoption of cloud computing and outsourcing boost the outlook even higher.

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