

Thailand Information Technology Report Q3 2016

<https://marketpublishers.com/r/T026E436A07EN.html>

Date: June 2016

Pages: 73

Price: US\$ 1,295.00 (Single User License)

ID: T026E436A07EN

Abstracts

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BMI View: A hard landing in China continues to cast a shadow over the regional economic outlook, but our core scenario for Thailand is an improvement in IT market dynamics over the medium term. We forecast IT spending will increase at a CAGR of 6.6% over 2016-2020 to total spending of THB230.1bn in 2020. For the hardware segment improvements in Thailand's household income profile envisaged over the medium term will directly drive retail PC spending growth. Software and services will benefit indirectly from the stronger economic sentiment, and specific products such as cloud computing, outsourcing and smart services are expected to outperform as enterprises modernise and look to efficiency gains and cost savings.

Latest Updates & Industry Developments

Computer Hardware Sales: THB94.0bn in 2016 to THB109.1bn in 2020, a compound annual growth rate (CAGR) of 3.8%. After deferred spending in 2014 and 2015 there is significant growth potential as income profile strengthens from 2016, with personal device sales of notebooks and tablets expected to outperform.

Software Sales: THB16.2bn in 2016 to THB23.9bn in 2020, a CAGR of 10.2%. Enterprise modernisation and e-government initiatives should drive spending growth, while local industry development and low-cost SaaS could result in wider adoption by SMEs.

IT Services Sales: THB68.1bn in 2016 to THB97.1bn in 2020, a CAGR of 9.3%. As local enterprises increase outsourcing and cloud computing gains traction we expect IT services demand growth to outperform.

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