

Vietnam Information Technology Report Q4 2016

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Abstracts

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BMI View: Vietnam's economic outlook is a supportive factor for a bullish IT market outlook that is especially strong in software and services, where economic modernisation will create huge opportunities for vendors. We expect this momentum to support an IT spending CAGR of 8.0% over 2016-2020 in Vietnam. There is however increased uncertainty surrounding the hardware segment where there is growing concern that the popularity of smartphones could result in significant numbers of consumers bypassing the PC era. Meanwhile, the IT industry has a very strong outlook as Vietnam has emerged rapidly as a production centre for both IT hardware and services such as software development outsourcing.

Latest Updates And Industry Developments

Computer Hardware Sales: VND36.7trn in 2016 to VND44.5trn in 2020, a compound annual growth rate (CAGR) of +5.0%. Steep declines in retail PC sales in H116, but despite threat of cannibalisation by smartphones we expect modest medium term growth.

Software Sales: VND11.2trn in 2016 to VND16.5trn in 2020, a CAGR of +10.3%. Economic development that includes foreign investment in manufacturing and outsourcing industries will create new opportunities.

IT Services Sales: VND17.6trn in 2016 to VND28.1trn in 2020, a CAGR of +12.4%. Low penetration means there is potential for core solution spending growth alongside higher growth in a booming cloud computing market.

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