



# Executive Summary

## Myanmar ICT Market Landscape Study

### Macroeconomics & IT Spend

Recognized as a newly emerging market in ASEAN, Myanmar's Gross Domestic Product (GDP) is estimated to reach US\$65.8 billion for fiscal year ending March 2016, with a steady 8.5% growth; the country expects a similar GDP's growth of 8.4% for the next fiscal period, ending March 2017.

Myanmar's inflation rate is currently at 10%. The overheating and overworked country's logistic support provide major infrastructure problems in Myanmar. However, the country has showed some improvements in customs, infrastructure, and competence in the last 4 years of liberalization, but yet there are capacity challenges. FDI into Myanmar is dominated by China with over US\$15 billion, mostly in hydroelectric power and oil & gas pipelines. This is followed by garment manufacturing and the telco sector due to recent deregulation efforts. As the new government is taking place, it has little experience running governmental bureaucracies, which will likely limit its effectiveness in the short-term.

Assuming a new government in transition, ministries in Myanmar have been trimmed from 36 to 21 with the most relevant change to ICT being the combination of the Ministry of Communications and Information Technology (MCIT), Ministry of Railway Transport (MRT) and the Ministry of Transportation (MOT) into one single ministry. Due to this new structure, MCIT is likely behind the curve from a regulatory perspective.

Sponsored by Korea International Cooperation Agency (KOICA), Myanmar's current ICT Master Plan 2015 sets certain milestones and objectives as following:

- Achieving 15% of tele density by 2015 in fixed lines and broadband, 45% (30 million subscribers) by 2015 in mobile penetration;
- Strengthening ICT security, construct proactive ICT infrastructure; establish efficient migration strategy for network operators;
- Preparedness for possible disasters for public safety;
- Set up an effective network management and maintenance system.

Recent launching of the Telecommunication Law has generated much impact on the current restructuring and investment on the telecom industry in Myanmar, the country now moving forward with stronger ICT initiatives through the renewal of Myanmar Foreign Investment Law (MFIL), introduction of new Banking Law, creation of more Special Economic Zones, and recent launching of its first stock exchange.

In 2016, the commercial segment estimated capturing 42.4% of IT spending share, which also included FDIs, government initiatives, and enterprise IT investment. The remaining 57.6% was attributed to the consumer segment, which has recently been fueled by strong proliferation of mobile devices spending.

Transport and communications, including telecom and media, are dominating IT spending in Myanmar. Telecommunication initiatives & infrastructure buildouts have contributed to the overall spend. Manufacturing, trading businesses (including import/export companies, reseller outlets, supermarkets, etc.) and BFSI are among other notable IT spending segments.

While public administration is expected to show minimal growth, if the newly elected-government is able to administer new tenders with efficiency and transparency, and attracts stronger FDIs, it would be expected that public spending on IT goods and services will exceed current forecasts.

Given the poor state of ICT infrastructure and access in Myanmar, hardware sales currently represent the primary driver of IT spending through 2019. Hardware spending reached US\$165.9 million in 2015 and forecasts to reach US\$256.41 million by 2019, representing 12.49% CAGR. Personal devices (mobile phones & PCs) represent 81.1% of hardware spending in 2015, largely due to proliferation of consumer devices currently taking place in Myanmar. Stronger growth in hardware spending continues in next few years as business end-users look to upgrade their corporate IT capabilities.

Software spending reached US\$19.59 million in 2015 and forecasts to reach US\$30.15 million by 2019, representing 11.54% CAGR. Spending in software has increased notably, but is somewhat misleading as software piracy in Myanmar is highly prevalent. Applications represent 54.17% of total software spending in 2015, these are mostly antivirus and PC solutions spend. Telecom, manufacturing, and trade businesses are among key spenders for software.

The much awaited Central Bank of Myanmar Law is expected to provide greater operational freedom along with more oversight. Local banks will expand their ATM, PoS, and core banking networks. The overall sector requires an upgrade in IT services, datacenter capacity, connectivity and network security to manage future compliance and reporting requirements.

The requirement of the federal, divisional & state, and local governments to improve IT systems, manage infrastructure and provide services to citizens represents a very high growth potential for System Integrators (SI); requirements here include improved IT systems, e-government systems, connectivity and datacenter capacity.

High growth in the hospitality industry have put pressure on local hoteliers to improve their infrastructure and customer service offerings to their guests. These hospitality providers will be required to improve IT systems, hotel guest management systems, entertainment provisioning and reliable Internet connectivity for guests.

The recent IDC's Myanmar Business End-user Survey 2015 has shown some key IT adoption trends:

- Increasing sales efficiency & IT alignment are most prioritized
- Majority are spending less for CAPEX; expecting a very price-conscious Burmese business customer
- Majority also spend the least for OPEX; in-house development is likely more prevalent
- With low penetration, Antivirus is dominating in IT Services products; IDC sees potential in IT Maintenance & Support to develop in the ICT sector

## IT Services Market Overview

Services spending reached US\$10.13 million in 2015 and forecasted to reach US\$15.07 million by 2019, representing 10.42% CAGR. Implementation represents 38.8% of total service market in 2015, with maintenance and support cover 24.1% in the same period.

Growth in IT services in 2015 was driven by SI works, primarily in the telecom & trade businesses as per infrastructure buildouts and front-end service needs. Manufacturing sector will continue to modernize and requires upgraded IT infrastructure and systems integrations services to connect their businesses as new FDI inflows increase into this segment.

The SI market in Myanmar is fragmented into many small providers with minimal high-level technical expertise. The market is also dominated by a few big players, who likely have future plans that go beyond their core SI business.

Due to lack of strong IT expertise, weak warranty services, and SLA oversights, many foreign-owned companies in Myanmar look toward foreign-operated SI providers or bring their own inter-department or in-house IT staffs into the country for implementation and maintaining their IT activities;

Large SI players in Myanmar look to move up the value chain through obtaining of NS, NFS-I, NFS-C or AS (telecom/network) licenses. IT and management talents are limited in Myanmar, resulting in very mediocre work product, while local SI players continue to remain under-capitalized.

The top local SIs in Myanmar by estimated 2016 revenues in US\$ millions are Myanmar Millennium Group (10), Myanmar ICT Development (5), Elite Telecom Public (5), Myanmar Information Technology (2.5), Forward Myanmar Technology (2), Frontiir (2), Myanmar Technology Gateway (1.5), 7<sup>th</sup> Computing (1), NEX4 (1), and Myanmar Computer Company (0.5).

## Market Entry Strategy

To create strategy of entering ICT market in Myanmar, considerations are needed to make especially in scope of government, IT infrastructure, IT adoption, public infrastructure, industry reforms and IT spending. These aspects matter especially in market entrance of service providers. Corporate enterprises will continue to upgrade their IT infrastructure and require systems integration (SI) services with an emphasis on financial services, manufacturing and public spending in the areas of healthcare and education. Competition for the skilled IT labor force is expected to drive up engineering and customer service salaries. Most SI companies in Myanmar are undercapitalized and lack notable experience on large SI projects and lack human capital to support a quality of service deliverable in support of complex and/or mission critical SI projects;

The current government transition is seen as positive, but due to the lack of experience of the new administration in operating a bureaucracy, growth in IT spending is expected to be slow down until such time as the new administration has adjusted to their new role of managing a country.

Top demands from the business end-users currently are fixed internet (connectivity) and IT maintenance and support; there is also a priority within end-user enterprises in aligning and adapting IT to the changing business landscape.

Media is expected to be liberalized in the next 2 to 3 years, which will provide opportunities for foreign media players to enter into the market and will require additional SI services and solutions.

In order to penetrate Myanmar, focus on programs that encourage the use of Malaysian IT goods and services; not just partnerships with specific SI providers. Data centre services have a strong demand in Myanmar, yet lack of infrastructure leaves a lot to be desired which provides a real good partnership platform for MDEC to position Malaysian MSC players in this area.

Provide technical support to SI players; and go-to-market strategies that can create a broader distribution and demand for Malaysian IT goods and services. MDEC should develop a strategy to create demand for Malaysian IT (and media) goods and services by providing training and financial resources that are tied to the beneficiaries of these programs commitment to acquire Malaysian IT (and media) offerings, by:

- Providing subsidized training to SI providers on Malaysian IT equipment so that they integrate these products into their SI solutions (within Myanmar and also in Malaysia) with certifications and/or degrees provided to passing students
- Creating an innovation hub sponsored by Malaysian funding (which requires the integration of Malaysian IT goods and services to qualify for funding)
- Providing financial support to select SI providers that agree to work (or partner) with Malaysian IT firms; data centre development is an opportunity that currently is untapped

IDC sees a long term of development and urgency in Myanmar which requires current development in terms of regulation and infrastructure in the country. The basic ICT education and penetration in Myanmar may require deep pockets for service providers' involvement in the present. With the newly elected-government already in place, the next critical step for further development of ICT in Myanmar, will be through regulations and infrastructure.

### Key Products

The different solutions that present different opportunities for MSC exporters are as follows.

- **Hot Solutions.** Financial applications is top solutions required by business end-users in Myanmar with healthy CAGR in next 5 years.
- **Warm Solutions.** HCM solutions are part of an IT modernization efforts, will generate demand by Burmese enterprises for HR resource integration. Security solutions have strong CAGR growth in the long-term, but current revenue streams are hindered by piracy and low investment level.
- **Cold Solutions.** Operating Systems solution is required, but most likely little long-term importance in the business process.

## Key Verticals

Looking ahead to the future, the different verticals that present different opportunities for MSC exporters are as follows.

- **Hot Vertical.** BFSI, Telecommunications and Hospitality services are the leading verticals for current and future opportunity in Myanmar. Establishment of Yangon Stock Exchange, insurance offerings and retail banking growth will fuel further development of BFSI sector. Infrastructure buildout and connectivity reach remain key priorities for Telcos. Physical building, online services and payment facilitating are also key development for hospitality.
- **Warm Vertical.** Newly-elected Myanmar government will go through cabinet reshuffling and personnel restructuring, G2B and G2C services are required to continue. Expected upgrade of power infrastructure and public works through ODA-funded projects. Myanmar also continues to offer cheaper labour in comparing to neighbouring labour-intensive markets like China & Vietnam. Manufacturing sector will remain attractive to more FDI. Healthcare services in Myanmar is substandard and inadequate, and requires a major overhaul. With a liberalization approach, the sector expects more privatization and overseas aid into the sector. Private education is also expected to see more opportunities due to inadequate premium education offerings. These sectors will see better investment opportunities as demands increase.
- **Cold Vertical.** Oil and gas sector now is waiting to see better pricing to return before improving spending. Resource industry in Myanmar also facing some public scrutiny in mismanaging the country's natural resources. This also impact great deal on development and investment of the sector. Retail sector will await further for better infrastructure and growing of the middle class.

The following table lists the more prominent System Integrators in Myanmar for MSC companies to consider potential partnership.

System Integrators	Strengths & Weaknesses	Opportunities	Go-to-Market	Key Verticals & Solutions	IDC Opinion
Frontiir	<p>U.S. financial backers; Quality vendor relationships; Good market penetration strategy</p> <p>Want to move into other businesses and may cause loss of focus and reallocation of resources</p>	<p>Wi-Fi integration and internet provisioning; Competing in large-scale SI project</p>	<p>U.S. financial backers (co-founded by 3 ICT expertise with 30 years of combined industry experience in the US.) with good quality vendor relationships and good market penetration strategy.</p> <p>An IT company with missions to provide affordable digital access and useful information services to people and help overcome the global digital.</p> <p>Frontiir's business is ranging from enterprises ICT, communication services, and ICT equipment sales and distribution.</p>	<p>Verticals: Banking, Insurance, Government, Healthcare, Communications and Media</p> <p>Solutions Focus: Enterprise Resource Planning (ERP) and Reliable &amp; Secure Corporate Intranet, Managed ICT Services with SLA, Online Shopping with Credit Card Payments, Servers, switches and routers sales</p>	<p>Frontiir is a top tier ICT company in Myanmar with a mission to provide affordable digital access and useful information services to people in the country.</p> <p>Its parent company is a Singaporean-based with strong financial backing, the company wants to compete further on large scale SI projects and targets on WiFi integration and Internet provisioning business opportunities.</p>
7 <sup>th</sup> Computing	<p>Provides enterprise ICT services to hotel industry (primarily) and other industries such as banking</p> <p>Offers enterprise software packages</p> <p>Strong local presence</p>	<p>Competing in both large-scale &amp; medium-scale SI projects</p>	<p>Strong local presence</p> <p>Some staff with international IT experience which would help 7<sup>th</sup> Computing to have good profile for SI deals relating MNCs</p> <p>7<sup>th</sup> Computing focuses on solutions offerings, such as Banking Software Applications, Hotel</p>	<p>Verticals: Banking, Insurance, Government, Healthcare, Communications and Media</p> <p>Solutions Focus: Enterprise ICT services to hotel industry primarily (Hotel Management Software) and other industries such as Banking Software Applications, Retail Chain Management Software, Human Resource Management</p>	<p>Heavily focuses in enterprise solution offerings across several key vertical segments (banking, retail, hospitality, HR and logistics), 7<sup>th</sup> Computing has established a strong presence in the market despite being in the business since 2010.</p>

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	Some staff with international IT experience		Management Software, Retail Chain Management Software, Human Resource Management System, Shipping Logistics, Enterprise Software and other software implementation based on customer's requirements.	System, Shipping Logistics, Enterprise Software.	With limited financial resources, 7 <sup>th</sup> Computing is currently facing scalability challenges and growth limitation. This will hinder the company's ability to compete as well as customer acquisition in the market.
NEX4	Japanese backing Trained staff Focus on finance industry Lack of IT trained staff	Large scale project SI  Virtualization bank datacentre and network infrastructure	Targeting Japanese companies in Myanmar by leveraging CEO's background connections Position product offerings as a total package solution	Verticals: BFSI  Solutions Focus: IT infrastructure and security services for leading organizations in Myanmar, especially in financial industry. Enterprise and Datacenter Security, Identity Management and Reporting Enterprise PKI (Public Key Infrastructure), AAA (Authentication/Authorization/Accounting), VPNs (IPSec/SSLVPN/OpenVPN), PCI-DSS Compliant Solutions, Application Delivery and Optimization	NEX4 targets into financial services industry through IT infrastructure and security solution service offerings. Its Managing Director, Aung Thurein, who studied and worked in Japan for over 12 years, is also serve as a key advisor on the Myanmar Stock Exchange. NEX4 has strong Japanese backing and client reach. Lack of good IT talents has hindered its ability to expand market reach.
Myanmar ICT Development	Powerful position of company within Myanmar IT industry;  Property in ICT Park gives them access to customers and potential partners	Market positioning should allow the company to gain government contracts	Want to become a leading ICT company in Myanmar  Property in ICT Park gives them access to customers and potential partners	Verticals: Education and Resource Industries  Solutions Focus: ICT infrastructure and establish Internet public access centers (PAC) throughout Myanmar	Owned and operated Yangon's ICT Park, MICTDC has created a facility and infrastructure platform for many ICT companies to leverage in a time when power reliability, network stability, and IT resources

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	<p>No real focus on SI as a growing part of their business; Aspires to be a player in datacenter and ISP space</p>				<p>are limited throughout Myanmar. ICT Park facility provides MICTDC a quick access to customers and potential partners. The company's profile also grants them a good position to win many government's contracts. Currently, SI business is not a major contributor to MICTDC's overall revenue shares; however, it offers long-term potential as MICTDC is taking on more government's projects.</p>
Elite Telecom Public	<p>Has a very powerful owner, U Tay Zar;  Positioned to get deals;  Strong funding  Owner on list of sanctioned business; Does business the "old" way; Loss of focus on SI business</p>	<p>Holds a NSF-I license, which allows them to offer more extensive telecom services that require SI support</p>	<p>Elite Telecom Public Co., Ltd was granted NFS (I) License; the company plan to leverage on the license to enhance their position in telecom sector while at the other hand it also help them to expand ICT services based on their infrastructure network.</p>	<p>Verticals: Banking, Banking, Communications &amp; Media, Government, Retail, Manufacturing</p> <p>Solutions Focus: DWDM Backbone Network, Metro Transmission Network, Domestic Bandwidth Wholesale, Private leased Line service (International/ Domestic), VPN service, Construction of Mobile Backhaul Network. International Gateway Service, ISP Service. Construction of Mobile Backhaul Network. Wireless Broadband, VOIP, Domain Registration.</p>	<p>Elite Tech is owned by a powerful business man, U Tay Za, who also is on the US-sanctioned list. They are focused on FTTx in Yangon (split territory with Fortune International) and have also historically been involved in the distribution of SIM cards and top up cards, and subcontracting work for state-owned MPT. Elite Tech has a strong footprint in retail, manufacturing and engineering services. Elite Tech has strong funding and connections</p>

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					that can help to access to government's projects. Most recently, it received a NFS-I license and is expected to enter the market as a fiber-based ISP. This will allow them to offer more extensive telecom services that require SI supports.
Myanmar Millennium Group	<p>Solid contacts and opportunities via investment partners;</p> <p>Good vendor relationships</p> <p>Lack of leadership vision;</p> <p>Financial resources limited</p>	Has potential to win large scale IT projects If stay focus and improve HR talents & quality of service	MMG provides a complete portfolio of telecommunication and technology services, which ranges from enterprise to carrier-size service class to managing an entire ICT infrastructure	<p>Verticals: Government and Banking</p> <p>Solutions Focus: eGovernment Solutions; Infrastructure, MPLS, Metro, LAN/WAN, Security, Content/Web Filter, AV, AS, VPN, DDoS, Mobile/Wireless/Telecom ,2G &amp; 3G VAS Apps &amp; Services, SuperWiFi, Radio Coverage &amp; Optimization, Unified Communications, VoIP, Video Conference, Telepresence, Satellite Communications, Data Center. Banking Solutions: Managed Authentication, Infrastructure, Security, Servers/Storage, Mobile/SMS Banking</p>	A well-focused SI company in Myanmar, MMG also has equity share in MICTDC and MIT. This helps them to broaden market reach as well as business influences across the market place. MMG has an extensive partner list of major IT vendors, which can be a challenge to take on MDEC member's products and services. Has good business infrastructure that can extend market reach beyond Yangon territory. MMG's solution offerings are heavily targeting banking segment.
Forward Myanmar Technology	Old organization, and been in market for many years	Growing IT market	Focus on networking solutions (Structured Cabling, Voice & Data	Verticals: Small Medium Enterprises (SMEs)	Starting out as turnkey contractor and VAR of voltage, fire and security

System Integrators	Strengths & Weaknesses	Opportunities	Go-to-Market	Key Verticals & Solutions	IDC Opinion
	<p>No SI experience</p> <p>Lack of funds</p> <p>Lack of skilled staff</p>	<p>Could participate in low value SI projects</p>	<p>Networks, Wireless Networks, Digital Telephony, IP Telephony, Fiber Optics, etc.) to capture the growing trend of ICT market</p> <p>Participate in small value SI projects to gain experiences</p>	<p>Solutions Focus:</p> <p>Networking Solutions (Structured Cabling, Voice &amp; Data Networks, Wireless Networks, Digital Telephony, IP Telephony, Fiber Optics),</p> <p>Security Solutions (Video Surveillance, Access Control, Intruder Alarm, other Security Solutions),</p> <p>Life Safety System (Fire Alarm and Fire Suppression System, Emergency Lighting System, PAGA-Public Address and General Alarm),</p> <p>Building Automation and Control (Building Management System, Lighting Control System),</p> <p>Audio and Visual Solution (Large Screen Display, Video and Audio, Conferencing System),</p> <p>Other Solutions (Queue Management, Master Clock, SMATV/IPTV).</p>	<p>solutions, Forward Myanmar Technology (FMT) now shift business toward smart building management solutions and automation offerings. Lack of strong IT talents and funding, FMT faces scalability challenges and growth limitation.</p>
<p>Myanmar Computer Company</p>	<p>ISO-certified in education services; ICT services certified by SGS &amp; accredited by UKAS</p> <p>Microsoft's only Gold Learning Partner in Myanmar</p> <p>No real SI experience</p>	<p>Growing market needs in education &amp; training</p>	<p>Started off as the first ever computer training school in Myanmar in 1986, MCC had a good foundation to expand their business into ICT-related activities</p> <p>Leverage MCC's position as Microsoft's only Gold Learning Partner in Myanmar to expand their ICT products and services portfolio</p>	<p>Verticals:</p> <p>Hospitality &amp; Government</p> <p>Solutions Focus:</p> <p>Consultancy &amp; Outsourcing Services for LAN, WAN, Internet, Intranet, Extranet and Open Wiring System Environment.</p> <p>ICT training, Software as a Services, ICT Planning and Consulting Services, Customized Software Development, Datacenter and Information Processing Services.</p> <p><b>E-Government Solutions:</b> Government Online System (GOS), e-Government</p>	<p>Starting out as Myanmar's first computer training center in 1986, MCC Group has expanded its scope into other IT service areas. MCC Group is also among key founding member of Yangon ICT Park through MICTDC. MCC Group is doesn't have a strong SI experience, despite</p>

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	Lack of skilled staff			<p>Portal (g-MIS), Government Enterprise Resource Planning (g-ERP), Government Core Operation Management (g-COM), Document Management System (DMS), Content Management System (CMS), Knowledge Management System (KMS), Government Accounting System (GAS).</p> <p><b>SME Computerization Series:</b> Mini ERP, Logistics &amp; Distribution (Web GIS), Hotel Property Management System (OPERA Xpress).</p> <p><b>Enterprise solutions:</b> Industrial Management Information System (Enterprise Portal), Enterprise Document Management System, Enterprise Content Management System, Business Intelligence (BI), CoHuRSion (Comprehensive Human Resource Management System).</p>	efforts of expanding into this scope.
Myanmar Technology Gateway	<p>Strong software solutions design capabilities</p> <p>Financial resources limited</p>	<p>Ability to expand domain registration and hosting businesses to physical (datacenter) facilities</p>	<p>Focus on full service computer products company (primarily software) with strong software solutions design capabilities</p> <p>Leverage on client database of domain name registrar for Myanmar to expand business into more complexity ICT solutions</p>	<p>Verticals: SMEs</p> <p>Solutions Focus: Radwin wifi - Sub-6 GHz wireless broadband radio experts, Complete Point-to-Point and Point-to-MultiPoint product portfolio, Deployments in over 140 countries, Part of RAD Group, Israel's largest telecommunications group, Regional offices worldwide; extensive network of partners, Backhaul, Access &amp; Video Transmission solutions.</p>	<p>A strong Internet and network solution player in Myanmar, it is well-known as Internet's domain registration service. MTG has strong software solution design capabilities.</p> <p>Has an extensive client base through Internet's business.</p>

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Myanmar Information Technology (MIT)	<p>Excellent contacts and well-position in market;</p> <p>Strong customer base; good strength with in-house IT talents</p> <p>Does business the old fashioned way;</p> <p>Deals with Ministry of Defense so may be some reputational risk</p>	<p>Ability to expand from existing customer base;</p> <p>Targeting new MNC entrants</p>	<p>MIT continues to focus on designing and developing software applications for local and foreign businesses in Myanmar. They are also successfully entered into overseas market with a subsidiary in Singapore. MIT provides a completed solutions package for their customers including customized apps, HRM, CRM, POS by leveraging their domain and business expertise and strategic partnerships with global leading technology providers.</p>	<p>Verticals: BFSI, Retail, Manufacturing, Hospitality, Healthcare, Transportation, Government &amp; Public sectors</p> <p>Solutions Focus: Core banking: Online Banking Transaction Processing, Data-warehousing for CRM, MIS, ERP, HRM. ERP: It comprises integrated modules nominal ledger, cashbook, sales, purchase, inventory, retail POS. It is also integrated with CRM solutions. Pay Master: a payroll processing application designed and built for organization of any size. Human Resource Management: eHRM is a HRM application designed and built for small to large enterprise. eHRM can either use as standalone system or integrated with PayMaster. POS systems, inventory management and e-government platforms.</p>	<p>Very strong IT player in the market; MIT co-founded MICT Park and MICTDC. Focuses heavily in developing enterprise software platforms, the company has an extensive list of client base, both local and overseas companies. MIT's products and services are similar and complementary to MDEC's members and partners. Has very strong business ties with Ministry of Defense.</p>

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