

Czech Republic Information Technology Report Q4 2016

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Abstracts

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BMI View: We expect relatively strong growth in Czech IT spending throughout the medium term to be driven by the software and services segments, where private and public sector modernisation and new technologies around cloud computing and the Internet of Things will support growth. We have a weaker outlook for the hardware segment, where market maturity and the threat of retail PC spending being cannibalised by smartphones limit the growth outlook. However, we do envisage a marked improvement from the contraction in 2015. For the IT market as a whole, we forecast spending will increase at a CAGR of 4.6% throughout 2016-2020 to CZK91.9bn, translating to a CAGR of 8.1% in USD terms as the koruna appreciates.

Latest Updates & Industry Developments

Computer Hardware Sales: CZK28.7bn in 2016 to CZK31.0bn in 2020, a compound annual growth rate (CAGR) of 1.9% in local currency terms. A more stable market expected after volatility in recent years, with growth set to be supported by rising incomes, but there is downside should increasingly powerful smartphones cannibalise PC replacement spending.

Software Sales: CZK18.3bn in 2016 to CZK22.8bn in 2020, a CAGR of 5.6%. Software market will deepen as competition from cloud delivered solutions pushes down prices.

IT Services Sales: CZK29.8bn in 2016 to CZK38.1bn in 2020, a CAGR of 6.4%. Growing demand from enterprises and the public sector for outsourcing and

cloud service will underpin IT services spending growth outperformance over the medium term.

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