

Hungary Information Technology Report Q4 2016

<https://marketpublishers.com/r/H61C4CB895DEN.html>

Date: August 2016

Pages: 71

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

ID: H61C4CB895DEN

Abstracts

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BMI View: Hungary proved a challenging IT market for vendors throughout 2010-2015, due to a combination of recession, a public sector spending squeeze and then steep forint depreciation in 2015. We expect 2016 will be another year of modest growth, when forint depreciation will be a drag on the hardware segment. However, our core scenario is for more robust medium term performance, particularly in USD terms, as a result of significant forint appreciation forecast for 2017-2019. There is downside, due to Hungary's economic linkages with the Eurozone, meaning Brexit and the refocusing of investors on Eurozone challenges such as Italian banks could result in a regional slowdown that spills over to a weaker domestic economic outlook for Hungary.

Latest Updates And Key Forecasts

Computer Hardware Sales: HUF209bn in 2016 to HUF233bn in 2020, a compound annual growth rate (CAGR) of 2.8% in local currency terms. There is pent-up replacement spending waiting to be unlocked, which should occur from 2017 and boost retail PC spending, but potential cannibalisation of notebook and tablet sales by increasingly powerful smartphones presents downside.

Software Sales: HUF113bn in 2016 to HUF135bn in 2020, a CAGR of 4.5%. Investment outlook for high spending financial services vertical is strengthening, and we expect demand growth for enterprise applications as lower cost cloud models deepen the market.

IT Services Sales: HUF211bn in 2016 to HUF275bn in 2020, a CAGR of 6.9%. IT Enterprise demand for cost-saving solutions such as outsourcing and cloud computing will drive the services segment, even as economic pressures become

less intense as growth strengthens.

Contents

BMI Industry View

SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Enterprise Trends - GVA By Vertical (Hungary 2015-2020)

Table: IT Industry - Historical Data And Forecasts (Hungary 2013-2020)

Industry Risk/Reward Index

Table: Europe IT Risk/Reward Index, Q4 2016

Market Overview

Hardware

Software

Cloud Computing

Services

Table: Public Sector* IT Spending (HUFbn)

Industry Trends And Developments

IT Hardware Trade

Table: CEE IT Hardware Trade, 2010-2015

Table: Hungary IT Hardware Trade, 2010-2015

IT Industry Analysis

Table: Hungary IT Hardware Industry, 2009-2014

Table: Hungary Software & Services Industry, 2009-2014

Regulatory Development

Competitive Landscape

IT Companies - Hungary

IT Vendors - EMEA, 2015

Table: Computer Hardware

Table: Software

Table: Cloud

Table: IT Services

Retailers

Table: Major Electronics Retailers

Table: Major E-Commerce Retailers

Regional Overview

Demographic Forecast

Table: Population Headline Indicators (Hungary 1990-2025)

Table: Key Population Ratios (Hungary 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Hungary 1990-2025)

Table: Population By Age Group (Hungary 1990-2025)

Table: Population By Age Group % (Hungary 1990-2025)

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: IT Risk/Reward Index Indicators

Table: Weighting Of Components

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