

Poland Information Technology Report Q4 2016

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Abstracts

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BMI View: We forecast total IT spending will increase at a CAGR of 5.9% throughout 2016-2020 to PLN34.0bn, with a substantially faster USD CAGR of 10.6% as zloty appreciation boosts performance from 2017. Appreciation will boost the hardware segment, where there is pent-up replacement demand and potential for rising average selling prices, but it is software and services where we still forecast outperformance. There is, however, some potential downside from zloty appreciation, which would be a squeeze on the competitiveness of Poland's large IT industry, where it is a major regional centre for hardware, software and services.

Latest Updates & Industry Developments

Computer Hardware Sales: PLN10.3bn in 2016 to PLN11.2bn in 2020, a compound annual growth rate (CAGR) of 2.2%. Pent-up demand and zloty appreciation present upside for PC sales, but replacement cannibalization by increasingly powerful smartphones.

Software Sales: PLN5.1bn in 2016 to PLN6.8bn in 2020, a CAGR of 7.6%. Economic sentiment will be supportive of the market as a whole and outperformance potential in specific vertical sand products such as data analytics and real-time software.

IT Services Sales: PLN11.7bn in 2016 to PLN16.0bn in 2020, a CAGR of 8.2%. In addition to core service growth, a deepening market for cloud computing and Internet of Things solutions add to momentum.

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