

Serbia Information Technology Report 2016

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Abstracts

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BMI View: After being a regional underperformer for much of 2012-2015, we believe Serbia's IT market is poised to enter a period of faster growth over the medium term, but particularly from 2017. Central to this view is our Country Risk team for Serbia's positive economic outlook including household income growth, increasing purchasing power in global markets and strengthening business sentiment - all of which should deepen the market, as well as alleviate some price sensitivity. We believe the retail market will fare relatively well in a European perspective 2016-2019, but nonetheless be outperformed by software and services demand that will be underpinned by enterprise and public sector modernisation and service launches. There is particularly strong growth potential for cloud computing services, although we caution this will require significant investment in data network and datacentre infrastructure to remove the existing bottleneck to wider adoption. For 2016-2019 we forecast a CAGR of 6.6% to almost RSD67.3bn in 2019.

Latest Updates And Industry Developments

Computer Hardware Sales: RSD31.6bn in 2016, rising to RSD37.3bn in 2019, corresponding to a CAGR of 4.7%. Household income growth and deferred purchases from the period of economic uncertainty will allow vendors to tap into the relatively low PC penetration rate in Serbia over the medium term.

Software Sales: RSD7.6bn in 2016 to RSD10.1bn in 2019, corresponding to a CAGR of 8.6%. Enterprise application spending growth the key driver, with upside potential should cloud computing supply increase, which would enable a deepening of the market to Serbian SMEs.

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