

# Turkey Information Technology Report Q1 2016

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## Abstracts

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**BMI View:** Our core scenario for Turkey is bullish, with a convergence of income growth, declining device prices, inward investment and domestic private and public sector modernisation initiatives predicted to drive demand growth. However, there exists significant downside risk from both the vulnerability of the economy to shocks due to reliance on external financing, the growing concerns over the domestic political situation and the potential for security threats from neighbouring Syria. Internet censorship is a growing characteristic of President Recep Tayyip Erdogan's administration and could be a deterrent for investors.

### Latest Updates And Industry Developments

**Computer Hardware:** Forecast growth from TRY14.0bn in 2016 to TRY18.2bn in 2019, at a compound annual growth rate (CAGR) of 9.2%. Traditionally low PC penetration presents a huge opportunity for vendors, but government plans to increase customs tax on electronic imports presents downside risk, particularly in the tablet segment

**Software:** Predicted growth of TRY2.9bn in 2016 to TRY4.2bn in 2019, at a CAGR of 13.6%. Competitive pressures resulting from trade liberalisation and modernisation, as well as wider access to cloud delivery software-as-a-service (SaaS) products underpin our positive medium-term outlook for software spending growth

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