

Turkey Information Technology Report Q2 2016

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Abstracts

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BMI View: Turkey's IT market growth trajectory took a downturn in 2015 when a combination of lira depreciation and political unrest resulted in deferred purchases and heightened price sensitivity. Based on our forecast for economic conditions to remain challenging in 2016 we expect the IT market will only strengthen marginally from 2015, and contract again in US dollar terms due to lira depreciation. The medium term outlook is however brighter, particularly from 2018, when we expect IT demand growth to resume on a trajectory determined by a convergence of income growth, declining device prices, inward investment and domestic private and public sector modernisation initiatives predicted to drive demand growth. We forecast total IT spending will grow at a CAGR of 8.6% 2016-2020 to a total of TRY24.4bn in 2020.

Latest Updates And Industry Developments

Computer Hardware: Forecast growth from TRY11.7bn in 2016 to TRY15.5bn in 2020, at a compound annual growth rate (CAGR) of 7.2%. Traditionally low PC penetration presents a huge opportunity for vendors when economic conditions stabilise, but in 2016 market expected to again contract in US dollar and volume terms due to depreciation.

Software: Predicted growth of TRY2.3bn in 2016 to TRY3.5bn in 2019, at a CAGR of 10.6%. 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

Services: CAGR of 11.6% over 2016-2019, increasing from TRY3.5bn in 2016 to

TRY5.4bn in 2019. Cost saving rationale of IT services make the segment more resilient in an economic downturn, while adoption of cloud computing services adds to medium term growth momentum as supply and awareness of potential benefits increases.

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