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Turkey Information Technology Report Q3 2016

https://marketpublishers.com/r/TFE749BC5E6EN.html
Date: May 2016
Pages: 66
Price: US$ 1,295.00 (Single User License)
ID: TFE749BC5E6EN

Abstracts

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BMI View: As is evident in the most recent data for IT hardware imports into Turkey, the market's growth trajectory turned downwards in 2015 as lira depreciation squeezed domestic demand - a trend that was exacerbated by deferred spending due to political unrest. 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 TRY11.72bn in 2016 to TRY15.50bn 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 TRY2.35bn in 2016 to TRY3.51bn in 2020, 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

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Services: CAGR of 11.6% over 2016-2019, increasing from TRY3.45bn in 2016 to TRY5.36bn 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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