

# Turkey Information Technology Report Q4 2016

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## Abstracts

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**BMI View:** The attempted coup and government response in July 2016 has raised uncertainty in what was already a challenging IT market. Lira depreciation hit demand for imported IT hardware in 2015, and now with further downside - in 2016 and over the medium term - this drag will persist. We do expect mediumterm recovery in IT market dynamics as the situation stabilises, but caution that downside risks are elevated and lira depreciation is likely to continue to be a drag on USD returns throughout the forecast period. We envisage Turkish IT spending will increase at a CAGR of 8.4% over 2016-2020 in lira terms, but the USD outlook is markedly weaker at a CAGR of just 1.1%.

### Latest Updates And Industry Developments

**Computer Hardware:** Forecast growth from TRY12.1bn in 2016 to TRY15.9bn in 2020, at a compound annual growth rate (CAGR) of 7.0%. Uncertainty and a weaker purchasing power growth forecast resulted in a downgrade following the coup attempt, but there is still potential in the hardware segment where PC penetration is lower than in developed markets.

**Software:** Predicted growth of TRY2.4bn in 2016 to TRY3.5bn in 2020, at a CAGR of 9.9%. Uncertainty a short-term drag, but competitive pressures resulting from trade liberalisation and modernisation will ensure a strong growth trajectory over the medium term.

**Services:** CAGR of 11.7% over 2016-2020, increasing from TRY3.5bn in 2016 to TRY5.4bn in 2020. Wider adoption of cloud computing and outsourcing services will make IT services the outperforming segment over the medium term.



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