Overview of IT Market in Turkey
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## Main Categories Yearly Figures

### YEARLY TREND OF THE CATEGORIES\(^a\) (Million USD)

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015(^5)</th>
<th>2016</th>
<th>2017(^6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Devices(^1)</td>
<td>2,369</td>
<td>2,489</td>
<td>2,405</td>
<td>2,016</td>
<td>2,116</td>
<td>2,296</td>
</tr>
<tr>
<td>Infrastructure(^2)</td>
<td>363</td>
<td>390</td>
<td>452</td>
<td>576</td>
<td>654</td>
<td>668</td>
</tr>
<tr>
<td>Software(^3)</td>
<td>425</td>
<td>476</td>
<td>543</td>
<td>621</td>
<td>714</td>
<td>747</td>
</tr>
<tr>
<td>Total IT Spending(^4)</td>
<td>3,157</td>
<td>3,354</td>
<td>3,399</td>
<td>3,213</td>
<td>3,485</td>
<td>3,711</td>
</tr>
</tbody>
</table>

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\(^a\) Constant Annual measurement is used for US$ spending. All values for all years are converted with a single exchange rate in this view, based on the average exchange rate of the base year. This means that year-on-year growth in the Value (Constant Annual) view is not impacted by exchange rate volatility and fluctuation. In the current version the markets are converted to US$ with 2016 average (3.03 TL/US$).

\(^1\) Excludes smartphone includes Traditional PC (A general purpose, single-user machine that is microprocessor based, can support attached peripherals, and can be programmed in a high-level language.), Tablet (Portable, battery-powered computing devices in a slate form factor that do not have a permanently attached keyboard and 2-in-1 device that is designed to function as a standalone slate/tablet as well as a clamshell device comparable to a notebook PC through the addition of a physical keyboard component made specifically for this device.), and PC Monitor (includes all (cathode-ray tube [CRT] and liquid crystal display [LCD]) displays designed for use with personal computers.). Hardcopy Peripheral (Group of hardware technologies that connect to a computer, digital camera, camera phone, or memory card to capture, print, or view content.) and Feature Phone (The devices running a proprietary or real-time operating system.)

\(^2\) Excludes Infrastructure as a Service, Telecom Equipment. Includes server, storage, and enterprise network (hardware purchased by Enterprise customers for the implementation of wired and wireless computer networks, which may be utilized for the transfer of data and voice traffic.).

\(^3\) Excludes application development and deployment. Includes applications (Commercial application software includes commercial, industrial, and technical programs and code-sets designed to automate specific sets of business processes in an industry or business function, to make groups or individuals in organizations more productive, or to support education, or data processing in personal activity.) and system infrastructure software (Includes software and SaaS solutions that provide both the basic foundational layers of software that enable bare metal infrastructure hardware resources to host higher-level application development and deployment software and application software and the virtualization and management software used to configure, control, automate, and share use of those resources across heterogeneous applications and user groups.).

\(^4\) Excludes IT services and includes extraction of hardware and software markets.

\(^5\) The major reasons behind the sharp decline of devices category in 2015 are the general election in June 2015 and early election in November 2015 that resulted to political and macroeconomic uncertainty in the country together with the significant depreciation of Turkish Lira against USD.

\(^6\) 2017 data is market forecast.
## Custom Categories 2017 Breakdown

### CATEGORY BREAKDOWN (Million USD)

| Category                | 2017
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>1,527</td>
</tr>
<tr>
<td>Software</td>
<td>747</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>668</td>
</tr>
<tr>
<td>Other Devices</td>
<td>474</td>
</tr>
<tr>
<td>Hardcopy Peripheral</td>
<td>295</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3,711</strong></td>
</tr>
</tbody>
</table>

1) Includes Traditional PC (A general-purpose, single-user machine that is microprocessor based, can support attached peripherals, and can be programmed in a high-level language.)
2) Excludes application development and deployment. Includes applications (Commercial application software includes commercial, industrial, and technical programs and code-sets designed to automate specific sets of business processes in an industry or business function, to make groups or individuals in organizations more productive, or to support education, or data processing in personal activity.) and system infrastructure software (Includes software and SaaS solutions that provide both the basic foundational layers of software that enable bare metal infrastructure hardware resources to host higher-level application development and deployment software and application software and the virtualization and management software used to configure, control, automate, and share use of those resources across heterogeneous applications and user groups.).
3) Excludes Infrastructure as a Service, Telecom Equipment. Includes server, storage, and enterprise network (hardware purchased by Enterprise customers for the implementation of wired and wireless computer networks, which may be utilized for the transfer of data and voice traffic.).
4) Includes feature phone, PC Monitors and Tablets
5) Group of hardware technologies that connect to a computer, digital camera, camera phone, or memory card to capture, print, or view content.
6) 2017 data is market forecast.
IDC’s Generic Market Sizing Approach

**Phase 1: Kick-off**
- Define list of companies to be interviewed
- Review contact list and ensure senior level engagement with the respective companies
- Make sure that the agreed company list will provide sufficient market coverage
- Create questionnaire & excel model to be used in data entry and market sizing

**Phase 2: Data Collection**
- Customize questionnaire for each interview
- Conduct interviews and ensure granular view, vertical-segment specific data, information concerning major activities are obtained per company
- Cross-check information provided from companies through other primary interviews and secondary research.
- Clarify drastic changes from the initial estimates/previous figures. Discuss major projects / investments that justify the estimates.

**Phase 3: Market Sizing**
- Create market sizing models based on secondary research and the primary research insights. Start putting together initial market sizing estimates.
- Enter segmental and vertical parameters to arrive at vertical and segment splits.
- Verify the data by cross-referencing data points and benchmarking the data with similar markets.
- Contact the key industry stakeholders to validate the market sizing data to ensure that the assumptions made sufficiently represent the view of the industry experts.
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49% of IDC analysts are based in emerging markets

300,000
IDC surveys more than 300,000 end users annually

110
IDC identifies key opportunities & trends in over 110 countries

Actionable advice for IT buyers, technology suppliers, and the investment community