



Turkey IT Market Predictions

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Turkey Software Market Predictions - 1

- For achieving technology-enabled business transformation, EAS solutions will help organizations to improve their business processes, application environments, and associated infrastructure. That is why EAS investments will be one of the key investment areas during this transformation period as well as collaboration and business continuity solutions.
- Since “data” is the foundation of all new technologies, the implementation of all software solutions on data excellence and data management will accelerate.
- Customer journey or customer 360 gain more importance, especially during post-pandemic. Thus, investments on software tools such as CRM will continue to accelerate.
- Taking the advantage of the cloud is the fundamental step of companies' transition to the digital economy, especially after the pandemic. IDC expects high demand on cloud platforms, compared to on-prem solutions, due to the advantages such as scalability, cost-effectiveness and agility.
- IDC forecasts the organizations to focus on "data protection and replication" solutions to protect their data because of the increase in ransomware attacks.
- By the use of container architectures, the demand for software solutions that enable integration as well as container orchestration will increase in order to meet the need for "persistent storage".

Turkey Software Market Predictions - 2

- With the proliferation of cloud technologies, it is expected that organizations that want to benefit from the cloud economy will spend on software solutions such as data archiving in the cloud.
- As organizations begin to transfer their critical workloads to hybrid or multi-cloud environments, ensuring cloud infrastructure security becomes more and more critical for organizations.
- The rapid increase in data security and privacy regulations in the country forces organizations to rethink their security control mechanisms. The excessive increase in application due to the digital transformation initiatives, which accelerated last year, positively affects the security strategies of the organizations.
- In the future, CISOs will focus mostly on endpoint security controls, mobile device security, network security, and identity and access management to ensure the protection of employee and customer information, corporate data, and IT infrastructure as the pandemic continues. DDoS attacks will be another challenge facing security teams during the ongoing COVID-19 outbreak.
- The new normal will force organizations to invest in VPN licenses, review firewall rules, and define new mobile security strategies. Besides, multi-factor authentication and privileged access management (PAM) became very strategic tools that tighten access control. The demand for PAM will continue to increase with the increasing use of VPN in enterprises.

Turkey Hardware Market Predictions - 1

- 2020 had a strong increase in Turkish PC History both in units and value. The commercial segment showed a 15.3% annual growth while consumer segment grew by 50% in units.
- The demand across PCs to facilitate remote work/learn/entertain from home, plus channel replenishment, drove a particularly strong year in 2020. Despite component shortages and supply chain problems ultimately dampening the overall potential of the market, the desktop market succeeded to grow by 20.3% while the notebook recorded a 45% yearly growth in value.
- The market experienced several commercial deals from various sectors such as banking, manufacturing, energy companies, public institutions, and holdings etc.
- Do It Yourself (DIY) category which is counted under “Others” per IDC taxonomy, showed a tremendous growth mainly supported by DIY Gaming PCs’ heighten demand during the COVID-19 era.
- IDC sees a moderate CAGR growth for PCs across the forecast period between 2019-2024.
- Unprecedented demand in the consumer and education segments due to work from home and online learning has undoubtedly led to the resurgence in tablet demand. Tablets recorded a three-digit yearly growth in value in the year 2020.
- Consumer tablet shipments showed a 55.9% annual growth while the commercial segment recorded 308.1% yearly growth in units. All end-user segments showed a strong growth in tablets, however education, public and very large business segments recorded the strongest annual growth in 2020.

Turkey Hardware Market Predictions - 2

- During pandemic conditions, operating remotely both for work and school drove the demand for tablets and additionally, backlogs for PCs led some consumers to purchase tablets in place of notebooks.
- Forecast demand is predicted to be supported by continued uptake in consumers and also increased adoption in the commercial segment through 2019-2024 forecast period.
- IDC forecasts a 5.3% CAGR growth in Turkey's Enterprise infrastructure market value between 2019-2024. Infrastructure forecast value includes servers, external storage, enterprise network and Infrastructure as a Service technology markets.
- IDC expects IaaS will be the most growing technology category as Pandemic supported the demand of "as a service" and Opex focused spending models.
- The enterprise network is expected to show a moderate CAGR growth between 2019- 2024. There is an uptake in projects from several industries, but mainly from the telecom industry to provide and maintain high levels of service for connectivity. COVID-19 drives network transformation to support business continuity and resilience across all segments.
- IDC expects IaaS will be the most growing technology category as Pandemic supported the demand of "as a service" and Opex focused spending models.
- The server market is expected to flat negative CAGR growth 2019-2024. Decreasing demand in non-x86 servers and shift to next generation & emerging technologies (hyperconverged, cloud, 3rd party services)

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