

Qatar Information Technology Report Q2 2016

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Abstracts

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BMI View: Qatar's economic outlook is brighter than its peers in the GCC - and this is reflected in our relatively strong outlook for IT spending growth over the medium term. Major government projects to modernise the economy and public services, as well as investments in infrastructure ahead of its hosting of the FIFA World Cup in 2022 all create a robust outlook for software and services spending over 2016-2020. The hardware outlook is weaker, with retail market saturation placing a limit on growth potential as vendors are reliant on replacement sales, but with high per capita incomes and a fashion conscious consumer base it will continue to be lucrative to premium vendors. We forecast a CAGR of 5.3% for the whole IT market over 2016-2020 to a value of QAR4.9bn.

Latest Updates & Industry Developments

Computer Hardware Sales: QAR2.4bn in 2016 to QAR2.8bn in 2020, a compound annual growth rate (CAGR) of 3.9% in local currency terms. Estimate of market size downgraded, but outlook for steady growth remains in place, with high incomes and short replacement cycles expected to offset limitations of saturation in PC market.

Software Sales: QAR478mn in 2016 to QAR607mn in 2020, a CAGR of 6.1%. The dominance of oil and gas in the local economy limits the size of the software market, but scope remains for growth in the enterprise market over the medium term through the modernisation and diversification government initiatives.

IT Services Sales: QAR1.1bn in 2016 to QAR1.5bn in 2020, a CAGR of 7.7%. Cloud computing adoption, along with early adoption of Internet of Things

solutions, underpins our outlook for segment outperformance based on emerging technologies spending growth.

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