

Bahrain Information Technology Report 2016

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Abstracts

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BMI View: The decline in the oil price has dampened the economic outlook for Bahrain since the last IT market update, reflected in our downward revision of our forecast to a CAGR of 4.9% 2016-2019 to a total value of BHD154mn. The impact will not however be far reaching under our core scenario, with Bahrain's status as a lucrative retail hardware market largely unaffected, and we maintain our view that premium device spending will provide high margin unit growth opportunities over the medium term. Meanwhile, in terms of enterprise spending growing demand from the financial services and telecommunications verticals, particularly for cloud computing and advanced solutions will offset the cutbacks in the oil and gas sector.

There is however heightened downside risk in the 2016 update, primarily through the potential for public sector IT spending cuts on modernisation initiatives in services such as healthcare, but this is not our core scenario.

Latest Updates & Industry Developments

Computer Hardware Sales: BHD62mn in 2016 to BHD67mn in 2019, equal to a CAGR of 2.6%. The maturity of the market means growth opportunities are limited, but a strong household income profile reflects the lucrative nature of the market in per capita terms, and premium PC replacement spending will be a key driver over the medium term.

Software Sales: BHD23mn in 2016 to BHD29mn in 2019, equal to a CAGR of 6.7%. We expect application spending by the public and private sector to grow through modernisation initiatives over the medium term, while cyber security solutions are expected to outperform due to heightened regional risks.

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