

# Egypt Information Technology Report Q4 2015

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## Abstracts

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**BMI View:** Egypt's IT market has remained below potential for several years as a result of political, economic and security uncertainty - and we expect the market to again underperform its long-term potential in 2015 as depreciation against the US dollar weighs on the outlook. Over the medium term, however, we expect growth will outperform regionally as a more stable domestic political and economic environment unlocks deferred purchases, helping the Egyptian IT market to return to a robust growth trajectory after disruption due to political crisis in recent years. A supportive policy environment is another important pillar of our bullish medium term outlook, for instance through the promotion of Egypt as a hub between the Middle East and Africa, the growth of the outsourcing industry and cloud computing adoption. Our generally positive outlook is also underpinned by a low penetration of PCs and IT services, which BMI expects vendors to capitalise on as private consumption growth gradually gains momentum over the five years to 2019.

**Headline Expenditure Projections:**

**Computer Hardware Sales:** EGP7.06bn in 2014 to EGP7.85bn in 2015, up 11.2% in local currency terms. A minor downgrade in Q415 to reflect faster depreciation of the Egyptian pound against the US dollar, which will be a drag on market growth in 2015, but strong demand for low-cost tablets will ensure growth continues overall.

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