

Kuwait Information Technology Report Q2 2016

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Abstracts

BMI View: The growth outlook for Kuwait's IT market is weak, with the slowdown in private consumption in a saturated retail PC market the main factor in a hardware centric IT market. We forecast total IT spending will increase at a CAGR of 1.4% over 2016-2020, with software and services expected to outperform. Although the hardware segment has the weakest outlook, and is expected to contract slightly over the medium term, it will nonetheless remain highly lucrative due to the large premium segment. Meanwhile, software and services have a brighter outlook as the low oil price acts as a catalyst for diversification and investments in cost-saving and flexibility-enhancing IT solutions.

Latest Updates And Developments

Hardware: Sales in Kuwait will decrease from KWD154.0mn in 2016 to KWD151.0mn in 2020, recording a compound annual growth rate (CAGR) of -0.6%. Weak consumption outlook in a saturated market will result in mild contraction of retail hardware spending.

Software: Spending is forecast to increase from KWD57.0mn in 2016 to KWD62.0mn in 2020, at a CAGR of 2.0%. Weak economic sentiment a drag on spending growth, but this will be offset by modernisation initiatives as enterprises look to cut costs.

Services: Spending is forecast to increase from KWD106.0mn in 2016 to KWD123.0mn in 2020, at a CAGR of 3.9%. The cost savings and increased flexibility offered by services such as cloud computing and outsourcing will support IT services outperformance in an environment of elevated economic uncertainty.

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