

Qatar Information Technology Report Q3 2016

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Abstracts

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BMI View: Demand for computer hardware held up better in Qatar than most commodity reliant markets in 2015, and we believe Qatar's medium-term outlook is stronger across the whole IT market than the rest of the GCC. Major project spending by the government will drive IT services demand as Qatar engages in major modernization initiatives for the economy and public services, particularly in infrastructure for the FIFA World Cup in 2022. The hardware outlook is weaker, with retail market saturation a placing a limit on growth potential and vendors are reliant on replacement sales. 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. Saturated PC market, including for tablets, means explosive growth is not possible, but high incomes should ensure short replacement cycles and premium product bias that will mean Qatar is still lucrative for vendors.

Software Sales: QAR478mn in 2016 to QAR607mn in 2020, a CAGR of 6.1%. The dominant oil and gas industry is an underweight software spending vertical, but there is scope 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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