

Saudi Arabia Information Technology Report Q4 2015

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Abstracts

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BMI View: We have completely revised our Q415 Saudi Arabia forecast for 2015 and onwards. We believe Saudi Arabia offers compelling growth opportunities for IT solutions providers across multiple industry segments owing to the kingdom's strong macro fundamentals and the government's economic diversification plan. We believe that global IT firms with considerable local presence will benefit the most from this opportunity. A number of major IT firms have already taken steps in recent years to ramp up their operations in the country, usually through partnerships with local system integrators. The macroeconomic and policy environment is driving IT market growth and investment in the private sector. However, there is downside from a prolonged period of depressed oil prices and regional security tensions. Nevertheless, the Saudi government's recent efforts to promote non-petro industries will bear fruit and IT services will benefit as a result.

Headline Expenditure Projections

Computer Hardware Sales: SAR20.67bn in 2014 to SAR20.93bn in 2015, -1.2% in local currency terms. Desktop and notebook demand are expected to continue recovery after cannibalisation during the tablet boom, but a slowdown in tablet demand will be a drag on overall hardware spending, resulting in a contraction in 2015.

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