

# United Arab Emirates Information Technology Report Q3 2016

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Date: July 2016

Pages: 71

Price: US\$ 1,295.00 (Single User License)

ID: UE88A1BBA12EN

## Abstracts

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**BMI View:** After spending contracted in 2015 as the hardware segment dragged down the IT market as a whole, we expect the market to return to growth over the medium term, but at a relatively subdued compound annual growth rate of 3.4% over 2016-2020, with total IT spending rising to AED19.6bn in 2020. Our core scenario is for the oil market to stabilise and raise the economic trajectory of the UAE and wider region, which will strengthen enterprise sentiment and encourage investment, particularly in software and services such as cloud services and Internet of Things solutions. However, the hardware market will be much more challenging for vendors as a result of market maturity and economic uncertainty.

### Latest Updates & Industry Developments

**Hardware Sales:** AED7.7bn in 2016 to AED7.4bn in 2020. A decline in visitor spending as sanctions on Iran are eased will be a drag given the core domestic market is saturated, outweighing the positive impact of population growth.

**Software Sales:** AED3.5bn in 2016 to AED4.2bn in 2020. Enterprise spending should move higher again, with areas of outperformance expected in Software-as-a-Service and cybersecurity solutions.

**IT Services Sales:** AED6.0bn in 2016 to AED8.0bn in 2020. Demand for cost efficiencies in the oil sector is a new opportunity for smart services providers, while more broadly we expect wider growth of outsourcing, managed services and cloud computing in the UAE.



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