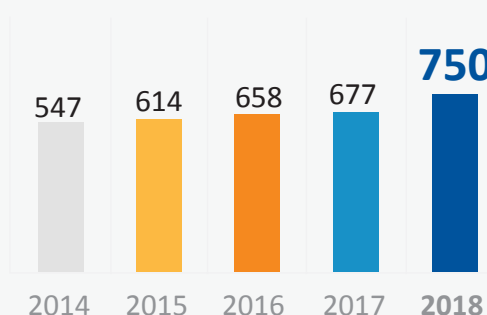


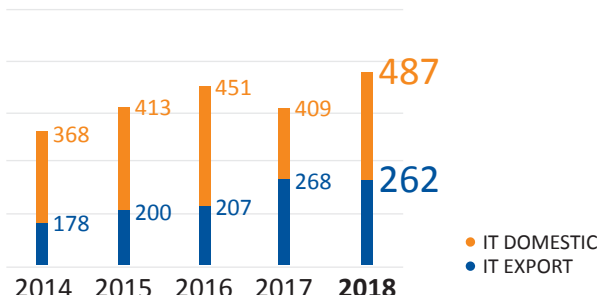
## IT & ITES ECONOMIC GROWTH 2014-2018 (MILLION USD)



IT & ITES total revenues grew by 10.71% in 2018, exceeding \$749.1 million in sales revenue.

The growth rate, while in double digits, is still below our ambitions which is largely due to political instability in the region which resulted in losing some important markets. Nonetheless, Jordan continues to be an important ICT strategic destination in the region.

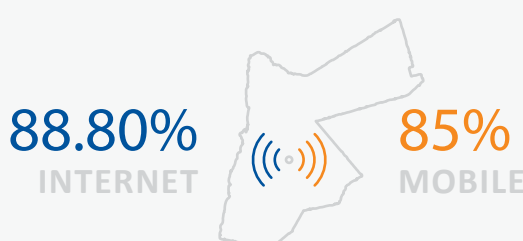
## IT DOMESTIC VS. EXPORT REVENUES 2014 -2018 (MILLION USD)



The IT & ITES export revenue in 2018 reached an estimated \$262 million, while domestic revenue stood at \$487 million. This small decline in exports (at 2.2%) requires the sector's ecosystem to join forces in exploring new market opportunities and enhancing export potential.

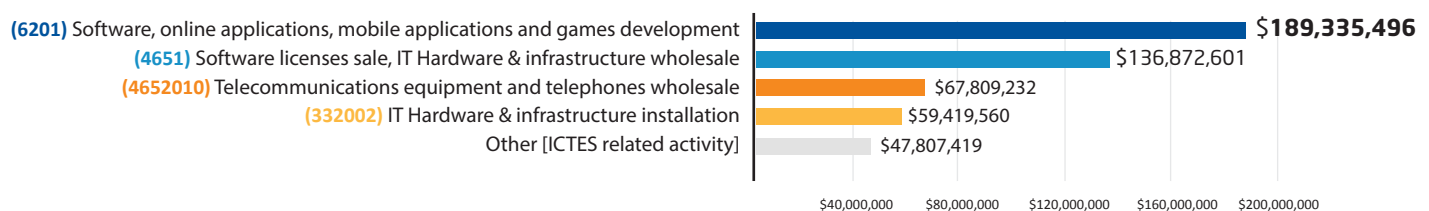
The rise in local revenues, clearly demonstrates the positive effects of the tax incentives enacted in 2016. These contributed to a boost of digitization and increased software sales in the local market.

## INTERNET AND MOBILE ACCOUNTS PENETRATION 2018



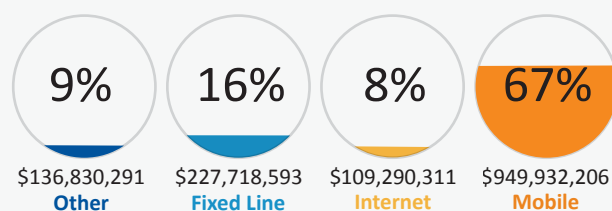
TRC, due to inflated stats collected from operators, adopted a different criteria in data collection, analysis and calculation that reflected actual figures. Mobile accounts penetration has slowed despite there being untapped markets for further internet and mobile services. More research and investment is needed to recover this segment's growth.

## TOP 5 IT AND ITES REVENUES BY ACTIVITY 2018

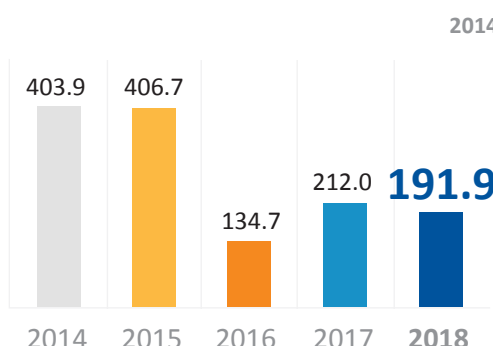


Jordan's Software Development tops the ranking in revenues for both domestic and export services. The Software industry alone in 2018 generated ~ \$189.3 million in revenues. Encouraging Jordanian IP creation will strengthen the sector's financial sustainability regionally and globally. This is one of int@j primary focus which created [www.ipreach.jo](http://www.ipreach.jo) to promote Jordanian IPs globally.

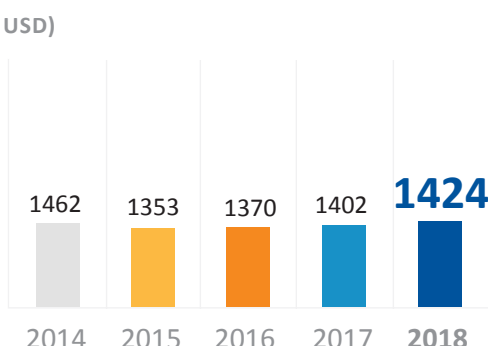
## TELECOM REVENUES DISTRIBUTION 2018



## ANNUAL INVESTMENT IN TELECOM



## TELECOM REVENUES



The Telecom sector continues to provide a main share of the total ICT revenue. However, a number of constraints including additional taxes and instability of regulation have caused a temporary setback to the sector's growth. More intervention focused on attracting investments and strengthening telecom companies' access to market is needed.

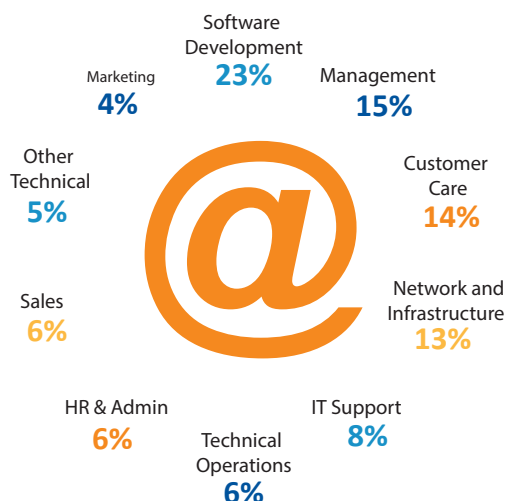
## IT & ITES BY EXPORTS REVENUE VOLUME 2018

SALE REGION	TOTAL EXPORT REVENUE IN USD	MARKET PERCENTAGE
Saudi Arabia	56,530,572	21.55%
UAE	39,581,441	15.09%
Kuwait	33,119,525	12.62%
Netherlands	20,036,286	7.64%
USA	19,822,979	7.56%
Iraq	13,268,001	5.06%
Egypt	10,839,912	4.13%
Qatar	7,887,165	3.01%
UK	7,685,742	2.93%
Palestine	6,305,316	2.40%

Saudi Arabia and the GCC countries remain as the top export markets of Jordan's ICT services. Focus shall be on nurturing and maintaining relationships with these countries by both public and private sectors. In an effort to do so, int@j has organized "Jordan Pavilions" and several matchmaking activities in various international and regional fairs striving to enhance the export of the sector.

## IT & ITES EMPLOYMENT BY FUNCTION

Jobs by software development function registered the highest employment numbers at a percentage of 23% of the total number of jobs in 2018. int@j in partnership with other stakeholders in the sector created the National Sector Skills Council (NSSC) that is an employer-led body that aims at reducing unemployment and fostering employment.



## ICT EMPLOYMENT BY GENDER



67% of total jobs were occupied by men (9,147 jobs) and 33% by women (4,506 jobs). Gender balance in the sector is improving with 3% more opportunities taken up by women in 2018. int@j drive to increase the job creation for women nationwide as part of its mandate, launching "SHETECHS" initiative in 2018 to empower tech females.

## ICT EMPLOYMENT 2017 - 2018

The rise in revenue with the steady employment rate indicates higher productivity of employees. Hopefully, the profitability increase will lead to a higher employment numbers in the near future. While realizing that the gap between academia output and market needs is directly affecting the employment rates, int@j and partners in the ecosystem are actively bridging the gap through boot camps, NSSC and other initiatives to improve job creation.

