

Venezuela Information Technology Report Q2 2016

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Abstracts

BMI View: The IT market in Venezuela plunged in US dollar value in 2015 as a result of devaluation, and with spiralling inflation, further bolívar weakness, political risk and a low oil price we expect further contraction in 2016 and over the medium term. We have a very bearish outlook for the IT market amid economic dislocation that has seen widespread deferred spending by households and enterprises, as well as product shortages due to restricted dollar access that has been so severe as to hit output by the domestic IT industry. There is elevated downside even under our bearish outlook, with increased risk of default or quasi default, though not our core scenario. We expect Venezuela to be the underperforming IT market globally in 2016 and over the medium term to 2020.

Computer Hardware Sales: From VEF9.9bn in 2016 to VEF24.5bn in 2020, at a CAGR of 25.5%. Inflation to drive local currency growth, but outlook is bleak due to sharp reduction in affordability and product shortages as even local assembly has stalled due to extent of economic dislocation.

Software Sales: From VEF3.2bn in 2016 to VEF8.9 in 2020, at a CAGR of 29.6%. Brain drain, piracy and weak enterprise investment outlook all weigh on the software spending forecast, with a return to growth only expected in final years of our forecast.

IT Services Sales: From VEF2.8bn in 2016 to VEF8.1bn in 2020, at CAGR of 29.9%. Cost saving and flexibility enhancing services such as cloud and outsourcing could benefit over long-term from experience of crisis, but in the medium term this will be overwhelmed by crisis.

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