

# Venezuela Information Technology Report Q3 2016

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## Abstracts

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**BMI View:** The government is hoping it can reinvigorate the local computer hardware industry through the creation of Special Economic Zones, but at least in the short- to medium term we expect local industry and IT market spending will be determined by the severe economic crisis. Demand plunged in US dollar value in 2015 as a result of devaluation in Q115, and with spiralling inflation, further bolívar weakness, political risk and a low oil price we have a bleak outlook for 2016. We expect 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, although 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%. Product shortages reported in 2015 as even local assembly stalled due to extent of economic dislocation, and there was a sharp deterioration in PC affordability due to devaluation, meaning the market is expected to remain depressed in 2016.

**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 VED2.8bn in 2016 to VEF8.1bn in 2020, at CAGR of 29.9%. Wider adoption of IT services would be advantageous to Venezuelan enterprises through cost saving and flexibility offered, but with a shortage of

local expertise and investors deterred, the outlook is also weak in this segment.

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