

# Venezuela Information Technology Report Q4 2015

<https://marketpublishers.com/r/V85E12A6E94EN.html>

Date: August 2015

Pages: 75

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

ID: V85E12A6E94EN

## Abstracts

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**BMI View:** The Venezuelan IT market, like the wider economy, is forecast to be a regional and global underperformer in 2015 - and over the medium term to 2019. The severity of the economic crisis and the weak prospects for recovery - at least in the short to medium term - mean there is also additional downside and potential. Exchange rate reforms enacted in February 2015 have hit IT market demand by eroding Venezuelan household purchasing power in global markets, thereby reducing demand for imports and imported components for assembly. The crisis is so severe that there have been widespread reports of device shortages in stores, as well as rapid price increases far in excess of wage inflation. This macroeconomic environment adds to the existing challenges posed by the policy environment in areas such as the promotion of local production, IP enforcement and the 2014 introduction of a fair-price law limiting operating margins to 30%. There are however opportunities even in this weak operating environment for vendors, particularly those willing to operate on longer time horizons; for example, by expanding local production to capitalise on the potential for export earnings over the medium term.

### Headline Expenditure Projections

**Computer Hardware Sales:** From VEF7.1bn in 2014 to VEF10.9bn in 2015. Sharp contraction forecast in real and US dollar terms, as well as a contraction of PC volumes in 2015 due to the impact of currency reforms, which raised the cost of imported PCs and components, as well as restricting the supply of devices.

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