Software Products and Computer Services

THE OPPORTUNITY

The devaluation of the peso in December 1994 sharply curtailed computer hardware sales in Mexico. Nonetheless, there are continuing opportunities for software and services.

- When restrictions on computer imports were removed in 1990, there was a dramatic surge in hardware purchases. The number of personal computers in use jumped by more than one-third in 1994 alone.
- The devaluation nearly doubled prices of imported hardware, but those who bought in 1994 still need to get the most out of their equipment.
- Industrial automation, geographical information systems (GIS) and office automation are all considered promising markets in the medium term.
- A partnership with a Mexican company seeking to fill out its product line is one of the best methods of entering this market.

OPENING UP TO HIGH TECHNOLOGY

The computer sector is one of the most rapidly growing elements of the Mexican economy. Beginning in the late 1980s, the government implemented a series of sweeping economic reforms that included trade liberalization and privatization of public enterprises. Mexican companies were forced to modernize to stay competitive as foreign suppliers moved into their formerly protected markets. Since purchases of high technology equipment had been severely limited by an import permit system, the effect of these reforms on computer markets was particularly dramatic.

Opportunities for foreign suppliers are especially attractive because the domestic computer industry is poorly developed and the nation has little investment in old technology to slow the pace of modernization.

Policies of self-sufficiency had been in place for decades before small computers emerged as a business tool, but the Mexican government was quick to include them under its protectionist umbrella. In 1981, the first of two decrees governing the computer industry was issued. It specified that all computer suppliers had to maintain local manufacturing facilities. A second decree in 1987 increased the local content required and imposed import permits for all computer equipment.

In April 1990, the computer decrees were rescinded and foreign computer manufacturers were

SUMMARY REPORT

In addition to this market summary, the Department of Foreign Affairs and International Trade (DFAIT) has prepared a market profile entitled ***Opportunities in Mexico: Software Products and Computer Services***. This information on the Mexican market for software products and computer services has been produced and published by Prospectus Inc. under contract with DFAIT, along with other market profiles and summaries on business opportunities in Mexico. It is available from:

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allowed to supply the Mexican market solely through imports. Although the decrees applied only to hardware, their removal has also had a strong effect on the demand for software and computer services. The availability of cheaper, more sophisticated equipment has had a natural tendency to promote new and more elaborate applications.

According to estimates published by the *Instituto Nacional de Estadística, Geografía e Informática (INEGI),* National Institute for Statistics, Geography and Informatics, Mexican computer sales jumped by 20 percent between 1993 and 1994 to reach US $3.4 billion. The devaluation of the peso in December 1994 depressed hardware sales during 1995, and most experts are predicting that they will not recover to 1994 levels for two years. Software and service sales, however, are likely to continue to benefit from strong 1994 hardware sales.

THE COMPUTER MARKET

The Mexican market for computer software and services has grown rapidly as the installed computer base continues to expand. The elimination of import permits in 1990, and the subsequent reduction of tariffs, had a dramatic effect on the market. Sales of computer technology exploded by 43 percent in 1990 and another 49 percent the following year. Even during the economic slowdown of 1993, sales of computer hardware, software and services rose by 10 percent. Hardware sales virtually halted in late December 1994 when the peso was suddenly devalued. Nonetheless, prospects for software and services are still considered good.

According to the *Instituto Nacional de Estadística, Geografía e Informática (INEGI),* National Institute for Statistics, Geography and Informatics, the number of personal computers (PCs) in use grew by 37 percent in 1994, to reach 2.2 million units. Computer literacy has grown as a result of computer-related courses in the universities, schools and private training providers. Several major computer magazines are now available in Mexico.

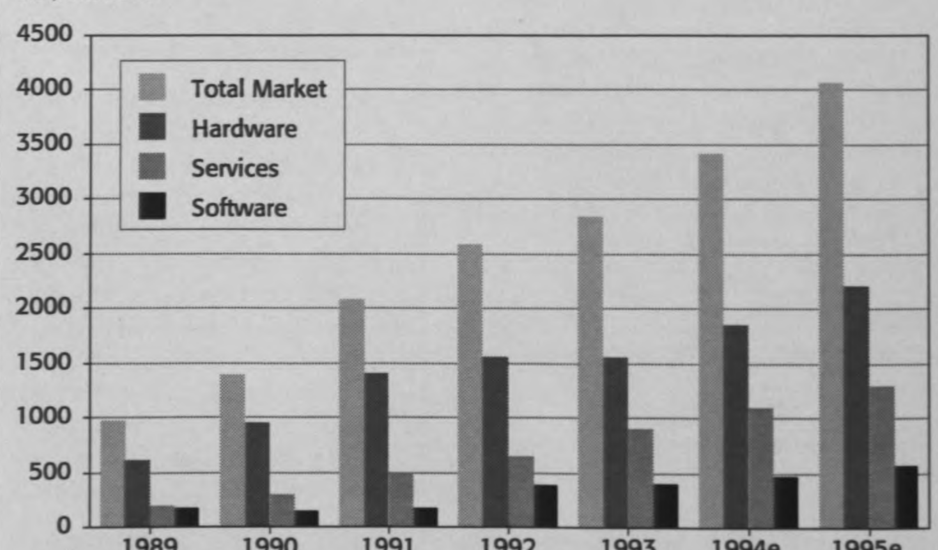
Foreign software companies account for close to three-quarters of the market. Most of the leading software packages are available in Mexico, including those for PCs, workstations and larger computers. Aggressive competition has led to falling prices. American companies dominate the import market, partly because the United States provides about two-thirds of the computer equipment used in Mexico.

According to estimates published by *INEGI,* the overall Mexican computer market in 1994 was worth US $3.4 billion. Of this, about 54 percent was hardware, 32 percent was services and 14 percent was software. Prior to the devaluation, *INEGI* was projecting 20 percent growth in the computer market for 1995.

There are almost 500 software developers in Mexico, of which 130 are members of the *Asociación Nacional de la Industria de Programas para Computadoras (ANIPCO),* National Association of the Computer Programming Industry.

The computer industry is constantly evolving, and is not readily divided into subsectors. Three major specialities are discussed in this summary. Industrial automation is the most dynamic segment in the private sector. In the public sector, there is an ongoing need for all kinds of large-scale databases, but geographical information systems (GIS) are especially promising. Although it is a more mature market segment, office automation is a continuing source of sales for computer technology suppliers. For the most part, the home computer market in Mexico is not yet sufficiently developed to warrant special emphasis.

Informatics Market in Mexico
US $ millions



Source: *Instituto Nacional de Estadística, Geografía e Informática (INEGI),* National Institute for Statistics, Geography and Informatics.

FOREIGN TRADE

Imported hardware has been hard hit by the devaluation of the peso and the economic crisis which followed. While services have been less affected, the crisis has created an advantage for local firms and products. Software has suffered the least because it is relatively inexpensive, and because customers have made considerable investments in hardware over the past two or three years.

According to estimates from the *Instituto Nacional de Estadística, Geografía e Informática (INEGI)*, National Institute for Statistics, Geography and Informatics, the total software market in Mexico totalled US $460 million in 1994. By some estimates, import penetration exceeded 80 percent. There is no official data on foreign trade in computer services. The total Mexican services market was about US $1.1 billion in 1994.

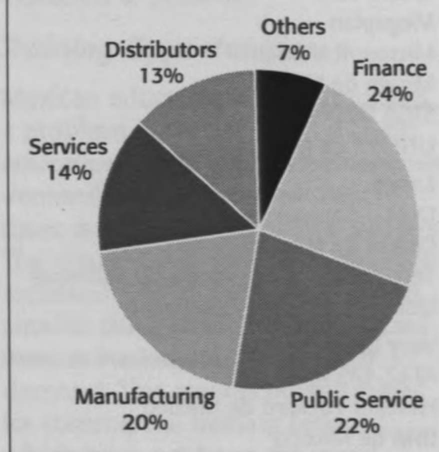
The United States claimed an 85 percent import market share for software and computer services in 1994. Canada's share was about 2 percent. Other significant suppliers were Ireland, Taiwan, Denmark and the United Kingdom.

CUSTOMERS

The devaluation of the peso has constrained the computer market, just as Mexican firms had been freed to import badly needed foreign technology. The need continues, even if the ability to finance imports does not. Until the crisis is resolved, the demand will be for software that maximizes the productivity of existing hardware. In particular, industry observers say that there is a strong demand for software packages aimed at specific industries or industrial processes.

Computer sales by sector for 1992 have been estimated by *Servicios de Estrategia en Electrónica (Select)*, a consulting firm based in Mexico City. Industry observers believe that this distribution will continue to be representative of the market for the next few years.

Computer Users by Sector



Source: *Servicios de Estrategia en Electrónica.* 1992.

Financial Sector

The financial sector is the largest group of end-users. Banks are the largest customers in this sector, followed by stock brokerage houses and insurance companies. The sector includes about 500 institutions.

Government Agencies

Government agencies comprise the second largest group of customers. Government agencies use the full range of packaged software, but many applications are developed in-house, sometimes with links to commercial packages.

Retail and Wholesale Distribution

Retailers and wholesalers are the third largest group of computer users. The biggest demand is for administrative applications, including payroll. Point-of-sale systems are being increasingly demanded by retailers, particularly large supermarkets and chains. Wholesale distributors are struggling to meet rising demands from their customers for just-in-time (JIT) delivery, and this creates a demand for specialized packages.

Manufacturing and Processing

The manufacturing and processing industries are substantial computer users. The most-frequently used software applications are for payroll, word processing, spreadsheets, accounting and project management. Companies in this sector also use process control applications, but many of these are developed in-house.

Service Sector

Companies offering consulting services to business are under increasing pressure to become competitive and many of them are computerizing their operations. Typical applications include project planning and professional billing.

Educational Institutions

Educational institutions, especially the larger universities, are important users of computer systems. The *Instituto Tecnológico de Estudios Superiores de Monterrey (ITESM)*, Monterrey's Technological Institute and the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, have the largest installed base.

COMPETITION

Most of the major computer manufacturers are active in the Mexican market. The market shares established by these companies has an influence on software sales because of the software that is usually bundled with them. The market is dominated by the large international companies. ACER alone claimed 29 percent of the market in 1994, and the top ten companies combined hold a market share of almost 90 percent.

Similarly, the major software publishers are all represented in Mexico. According to industry experts, approximately 90 percent of the packaged software sold in Mexico comes from foreign firms, but imports claim a smaller share of the custom software and services market.

Mexican Competitors

Mexico has no major domestic software firms. About 500 small software developers focus on specialized applications, especially for office automation and government administration. Their share of the overall software and services market is as high as 30 percent. About half of the software they produce is for personal computers, about 30 percent for minicomputers and the rest for mainframes.

The private sector requires accounting software appropriate for the Mexican tax environment, and this has created a demand for domestically produced software. Many Mexican firms concentrate on adapting and customizing foreign products for the Mexican market.

Major Computer Companies in Mexico, 1995

Company	Principal Activity
Medium	
APEMEX	software house
Autodesk Inc.	software representative
Computadoras y Capacitación Integral	consultants
Grupo TEA	software house
Megaplan	software house
Microsoft México	software representative
Moore de México	software representative
SIGA Desarrollos	software representative
UNISYS de México	hardware distributor
Large	
Digital Equipment de México	hardware manufacturer
Oracle de México	software distributor
Tecnología en Desarrollo de Sistemas	software house
Universidad Ibero Americana	academic
Very Large	
AT&T, GIS México	hardware distributor
Hewlett Packard de México	hardware manufacturer
IBM de México	hardware manufacturer
Novell de México	software house

Source: *Asociación Nacional de la Industria de Programas para Computadoras (ANIPCO)*, National Association of the Computer Programming Industry, 1995, based on membership data.

TRENDS AND OPPORTUNITIES

The devaluation of the peso in December 1994 resulted in a sharp reduction in the demand for imported products. According to industry observers, the demand for computer technology fell by at least half in the first few months of the year. Hardware has borne the brunt of the decline. Sales of software and services will continue as users try to get the most out of recent hardware purchases. Most observers see the present situation lasting until the end of 1995 and gradually improving in 1996.

Geomatics

Decision makers interviewed for this summary stressed the long-term need in Mexico for some sort of integration of geographical information systems (GIS). Ideally, all geographic information would be accessible through a single server platform. Advanced data analysis techniques, data conversion systems and specialized methodologies such as orthomapping will also be needed as the country's backlog of raw data grows.

The expected lull in equipment purchases creates an opportunity for selling knowledge-based services. Many of the larger buyers have already bought hardware, making education and training a top priority. The provision of training services provides both an immediate market and an opportunity to raise awareness of Canadian technologies.

Industrial Automation

Industry experts interviewed for this study agreed that a trend towards computer integrated manufacturing (CIM) is only in its infancy in most Mexican industries. Many companies have automated parts of their operations, but few have gone all the way and integrated their process control and planning functions.

Observers believe that there will be a gradual shift towards fully integrated systems over the medium term. In the short run, however, they agree that smaller-scale projects with fast results will dominate the market. Products that can be run on high-end personal computers rather than workstations will be in particular demand. Most companies have access to PCs but cannot afford workstations. Solutions in the US $6,000 range will have the greatest potential.

Consulting opportunities are concentrated predominantly in general technical services, including training, as well as in systems integration services.

Online Services

The Internet has only recently become available to non-academic users in Mexico, but the number of servers increases every month. Despite the devaluation, subscriptions to online services have increased at an estimated ten per month throughout 1995. At first, installations were limited mainly to universities and research organizations. For example, the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, has been online for four years. Corporate and government users are now being connected in rapidly growing numbers.

Since 1994, CompuServe has offered its services in Mexico at roughly the same price as in the United States. It is popular with business users, since it uses a fibre-optic link to the U.S., circumventing the difficulties of using the lines of *Teléfonos de México (Telmex)*, the national telephone company.

Product Opportunities

In today's economic environment, Mexican computer firms are concerned about survival rather than growth. For most of them, survival means making the most of established client bases and dealing in known products which have already earned consumer confidence. This is not considered a good time for innovation. More than ever, customer support is the key to software sales.

The business of customizing or adapting foreign software for Mexican use has good potential. There is also a demand for specialized software designed for particular industries. Examples include packages for tourism, point-of-sale and professional billing.

In the future, government purchases are expected to shift towards packaged software rather than custom-developed systems. The rising use of personal computers will make this increasingly possible.

Industry experts believe the market will gradually shift towards integrated services. Companies that can provide systems integration, including hardware, software and services, are expected to prosper.

Training Opportunities

Mexican educators have recognized a problem in the area of computer education. While there is tremendous demand for computer education, there is also a lack of skilled trainers. The result is that training is narrowly focussed. This is particularly true in smaller cities where computer hardware is inadequate to meet the demand. This creates opportunities for commercial training services, which have not been the usual source of computer training in the past.

THE REGULATORY ENVIRONMENT

There is virtually no regulation of computer software and services in Mexico. The new telecommunications law apparently includes some coverage of online services, but regulations have not yet been issued. Improved anti-piracy measures are the most important action the government has taken so far. The administration of President Ernesto Zedillo has strongly supported initiatives by the *Instituto Nacional de Estadística, Geografía e Informática (INEGI)*, National Institute for Statistics, Geography and Informatics, to promote the computer sector as a means of furthering the new administration's economic and social objectives.

The lack of a well-developed computer sector has severely limited Mexico's economic and industrial development. This fact has been widely recognized in Mexico and the government has acted to develop new policies to replace the self-sufficiency regulations which were rescinded in 1990.

In May 1995, President Zedillo announced the *Plan Nacional de Desarrollo, 1995-2000*, National Development Plan, 1995-2000. For the first time, the Zedillo development plan includes strategies for developing the use of computer technology. "Computer science" is recognized as a tool that can support the other objectives of the program, including economic growth, social and democratic development, and sovereignty.

INEGI has overall responsibility for computer policy in Mexico. It has sponsored a series of progressively broader forums to seek input from the industry and the public. In April 1995, for example, *INEGI* set up the *Foro de Consulta Popular sobre Informática* to advise on implementation of the new policies.

Public consultation is a normal part of the Mexican legislative process, and so far experts are mixed in their views about whether this process will result in practical action. For the most part, they see the formal incorporation of computer science in the National Development Plan as a strong first step.

MARKET ENTRY STRATEGIES

Mexican software distributors are always looking for new products. One distributor interviewed for this profile said that he travels regularly to the United States to see new products. He believes that Canadian products are beginning to gain some recognition in Mexico, especially in the communications sector. In his view, this is largely a result of Canadian government efforts to promote the industry.

The present trend in Mexico is toward systems integration services. Companies that offer such broad services need suppliers able to fill gaps in their offerings. This is especially true for the more specialized software solutions. There is a growing demand for industry-specific software and services, but customers increasingly want to buy the whole system from one supplier. This trend is creating an increased interest in strategic alliances with foreign firms.

Small- to medium-sized Mexican computer companies see partnerships with foreign companies as a way of competing with the large consulting firms that presently dominate the industry. Canadian companies are not well-known in Mexico, but there are good prospects for firms that can provide their own financing.

Perhaps the biggest obstacle to greater participation of Canadian firms in the Mexican software and computer services market is the lack of local presence. Mexicans prefer to purchase imported goods and services from companies with a demonstrated commitment to the local market.

A practical way to establish this presence is to form a strategic alliance or partnership with a Mexican company. Canadian firms can provide expertise and technology that mesh well with the market knowledge and relatively low operating costs of local partners. In today's economic environment, Canadian firms should be prepared to provide capital as well.

KEY CONTACTS

CANADA

Canadian Government

Department of Foreign Affairs and International Trade (DFAIT)

DFAIT is the Canadian federal government department most directly responsible for trade development. The **InfoCentre** should be the first contact point for advice on how to start exporting. It provides information on export-related programs and services, acts as an entry point to DFAIT's trade information network, and can provide copies of specialized export publications and market information to interested companies.

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Commercial Division of the Embassy of Canada in Mexico can provide vital assistance to Canadians venturing into the Mexican market. The trade commissioners are well-informed about the market and will respond in whatever measures possible to support a Canadian firm's presence in Mexico.

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Tel.: 344-3200
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Local 30-A
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Col. Vallarta Poniente
Guadalajara, Jalisco
México
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Fax: 15-8665

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. The centres operate under the guidance of DFAIT and all have resident trade commissioners. They help companies determine whether or not they are ready to export, assist firms with market research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you.

World Information Network for Exports (WIN Exports) is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 23,000 Canadian exporters. To register on WIN Exports, call (613) 996-5701, or fax 1-800-667-3802 or (613) 944-1078.

International financing institutions, including the World Bank and the Inter-American Development Bank, provide funds to Mexico for a wide variety of specific projects. DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities that are financed by international financing institutions. For further information, call (613) 995-7251, or fax (613) 943-1100.

Market Intelligence Service (MIS) provides Canadian businesses with detailed market information on a product-specific basis. The service assists Canadian companies in the exploitation of domestic, export, technology transfer and new manufacturing investment opportunities. MIS is offered free of charge by fax, letter or telephone. For more information, call (613) 954-5031, or fax (613) 954-2340.

Department of Industry

International Business Development
Department of Industry
235 Queen Street
Ottawa, ON K1A 0G5
Tel.: (613) 990-4096
Fax: (613) 990-4215

Canadian International Development Agency (CIDA)

CIDA is an important possible source of financing for Canadian ventures in Mexico. A special fund is available through the CIDA under the Industrial Cooperation Program (CIDA/INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. For more information, call (819) 997-7905/7906, or fax (819) 953-5024.

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EDC is a customer-driven, financial services corporation dedicated to helping Canadian businesses succeed in the global marketplace. EDC provides a wide range of risk management services, including insurance, financing and guarantees to Canadian exporters and their customers around the world.

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New Brunswick Information Technology Alliance
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Newfoundland Association of Technical Industries
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México
Tel.: 250-2611
Fax: 625-4385

Federal Electricity Commission
Comisión Federal de Electricidad (CFE)
Río Ródano No. 14
Col. Cuauhtémoc
06598 México, D.F.
México
Tel.: 553-7133, 207-3962/3704
Fax: 553-6424/6762

Mexican Institute for Social Security
Instituto Mexicano del Seguro Social (IMSS)
Paseo de la Reforma No. 476, Piso 6
Col. Juárez
06698 México, D.F.
México
Tel.: 211-0018, 726-1700
Fax: 211-2623

Secretariat of Social Development
Secretaría de Desarrollo Social (SEDESOL)
Av. Constituyentes No. 947
Edificio B, Planta Alta
Col. Belén de las Flores
01110 México, D.F.
México
Tel.: 271-8481/1616
Fax: 271-8862

Mexican Investment Board
Consejo Mexicano de Inversión (CMI)
Paseo de la Reforma No. 915
Col. Lomas de Chapultepec
11000 México, D.F.
México
Tel.: 202-7804
Fax: 202-7925

National Telephone Company
Teléfonos de México, S.A. de C.V. (TELMEX)
Parque Vía No. 190
Col. Cuauhtémoc
06599 México, D.F.
México
Tel.: 222-6950, 535-2041
Fax: 203-5104

National Telecommunications Company
Telecomunicaciones de México (TELECOM)
Eje Central Av. Lázaro
Cárdenas No. 567, Piso 11, Ala Norte
Col. Narvarte
03020 México, D.F.
México
Tel.: 519-4049, 530-3492
Fax: 559-9812

National Bank of Construction and Public Works
Banco Nacional de Obras y Servicios Públicos (BANOBRAS)
Tecoyotitla No. 100, Piso 4
Col. Florida
01030 México, D.F.
México
Tel.: 723-6000
Fax: 723-6108

Mexican Research Centres

Monterrey's Technological Institute
Instituto Tecnológico y de Estudios Superiores de Monterrey
Campus Monterrey
Av. Eugenio Garza Sada No. 2501 Sur
Sucursal de Correos "J"
64849 Monterrey, Nuevo León
México
Tel.: 358-2000
Fax: 358-8931

Advanced Computer Applications Laboratory
National Autonomous University of Mexico
Universidad Nacional Autónoma de México (UNAM)
Facultad de Ingeniería
Circuito Escolar, Ciudad Universitaria
Col. Coyoacán
04510 México, D.F.
México
Tel.: 622-3278
Fax: 616-1037

Business and Professional Associations

Mexican Association of Engineers in Electric and Electronic Communications
Asociación Mexicana de Ingenieros en Comunicación Eléctrica y Electrónica (AMICEE)
Balderas No. 94
Col. Centro
06050 México, D.F.
México
Tel.: 510-3142
Fax: 512-5300

National Association of Importers and Exporters of the Mexican Republic
Asociación Nacional de Importadores y Exportadores de la República Mexicana (ANIERM)
Monterrey No. 130
Col. Roma
06700 México, D.F.
México
Tel.: 564-8618/9218
Fax: 584-5317

National Chamber of the Electronic and Electric Communications Industry
Cámara Nacional de la Industria Electrónica y de Comunicaciones Eléctricas (CANIECE)
Culiacán No. 71
Col. Hipódromo Condesa
06170 México, D.F.
México
Tel.: 264-0417/0466
Fax: 264-0808

National Association of the Computer Programming Industry
Asociación Nacional de la Industria de Programas para Computadoras (ANIPCO)
Insurgentes Sur No. 1677-304
Col. Guadalupe Inn
01020 México, D.F.
México
Tel.: 663-3510/662-3632
Fax: 662-5880

The Canadian Chamber of Commerce in Mexico
Cámara de Comercio de Canadá en México
c/o Bombardier
Paseo de la Reforma No. 369
Mezzanine
Col. Juárez
06500 México, D.F.
México
Tel.: 729-9903, 207-2400
Fax: 208-1592

National Chamber of Commerce of Mexico City
Cámara Nacional de Comercio de la Ciudad de México (CANACO)
Paseo de la Reforma No. 42
Col. Juárez
06030 México, D.F.
México
Tel.: 592-2677/2665
Fax: 705-7412, 592-3571

American Chamber of Commerce in Mexico
Cámara Americana de Comercio en México, A.C. (AMCHAM)
Lucerna No. 78, Piso 2
Col. Juárez
06600 México, D.F.
México
Tel.: 724-3800
Fax: 703-2911

Mexican Confederation of National Chambers of Commerce
Confederación de Cámaras Nacionales de Comercio (CONCANACO)
Balderas No. 144, Piso 3
Col. Centro
06079 México, D.F.
México
Tel.: 709-1559
Fax: 709-1152

Confederation of Industrial Chambers
Confederación de Cámaras Industriales (CONCAMIN)
Manuel María Contreras No. 133
Piso 1
Col. Cuauhtémoc
06597 México, D.F.
México
Tel.: 592-0529, 566-7822
Fax: 535-6871

National Chamber of Manufacturing Industry
Cámara Nacional de la Industria de Transformación (CANACINTRA)
Av. San Antonio No. 256
Col. Nápoles
03849 México, D.F.
México
Tel.: 563-3400
Fax: 598-5888