

Argentina Information Technology Report Q1 2016

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Abstracts

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BMI View: We are anticipating a strong growth in the IT market in 2016 in local currency terms but peso weakness remains a problem for Argentina. US dollar denominated growth will be negative once again but a less hostile economic environment, including slower peso depreciation against the US dollar, which will mean less pressure on PC sales than under our previous forecast. We still expect a marked improvement from 2014 when the economic crisis had a major disruptive impact on the Argentine IT market, with the devaluation of the peso, import restrictions, high inflation, capital controls, shortage of credit and government debt default all contributing to a recession and sharp contraction of the IT market in US dollar terms. Over the medium term, we expect the market to move to a higher growth trajectory from 2016/2017 as confidence returns and deferred purchases from 2014-2015 are unlocked. Meanwhile, the impact of economic crisis was not wholly negative, with devaluation helping to make IT exports abroad more competitive and boosting industry development. There are also positive fundamentals for medium-term growth including increases in PC penetration, second device ownership, enterprise software penetration and cloud computing are examples of sectors that have growth opportunities.

Headline Expenditure Projections

Computer Hardware Sales: sales will jump by 21.5% in 2016 with market value reaching ARS23.9b in local currency terms.

Software Sales: will jump 21.2% in 2016 to an estimated ARS18.73bn. Small- and medium-sized enterprise demand for software and strong potential in enterprise resource planning applications should maintain growth despite macroeconomic challenges.

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