

Argentina Information Technology Report Q2 2016

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Abstracts

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BMI View: The Argentine IT market is forecast to continue to grow in local currency terms in 2016, but contract by over 30% in US dollar terms as a result of the devaluation in December 2015. In addition to the direct impact on purchasing power and economic sentiment in the short term, the expectation of devaluation ahead of the election resulted in a concentration of upgrades in 2015, and exacerbates the decline in 2016. Our core scenario is for a return to stronger IT market growth from 2017, underpinned by peso stabilisation and more benign economic conditions, supporting a CAGR of 12.8% over 2016-2020 as a whole. There is however downside, with the outcome of Argentina's negotiations with its creditors uncertain and potentially a source of external shocks in an already uncertain global economic environment.

Latest Updates And Industry Developments

Computer Hardware Sales: from ARS21.7bn in 2016 to ARS34.5bn in 2020, corresponding to a CAGR of 10.7% in local currency terms. Devaluation the key factor determining PC sales 2014-2016, but we envisage a return to more stable dynamics over the medium term with sustainable volume growth built on a foundation of rising incomes.

Contents

BMI Industry View

SWOT

IT SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: IT Industry - Historical Data and Forecasts (2013-2019)

Industry Risk Reward Index

Table: IT RRI Breakdown By Region, Q216

Table: Americas IT Risk/Reward Index, Q216

Market Overview

Hardware

Software

Cloud Computing

IT Services

Industry Trends And Developments

Regulatory Development

Competitive Landscape

International Companies

Table: IBM

Table: Sofrecom

Local Companies

Table: Axoft Argentina (Tango)

Table: Banghó

Table: Ceven

Table: Exo

Table: Noblex (Newsan)

Regional Overview

Demographic Forecast

Table: Population Headline Indicators (Argentina 1990-2025)

Table: Key Population Ratios (Argentina 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Argentina 1990-2025)

Table: Population By Age Group (Argentina 1990-2025)

Table: Population By Age Group % (Argentina 1990-2025)

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: IT Risk/Reward Index Indicators

Table: Weighting Of Components

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