

Brazilian Software Market | 2021

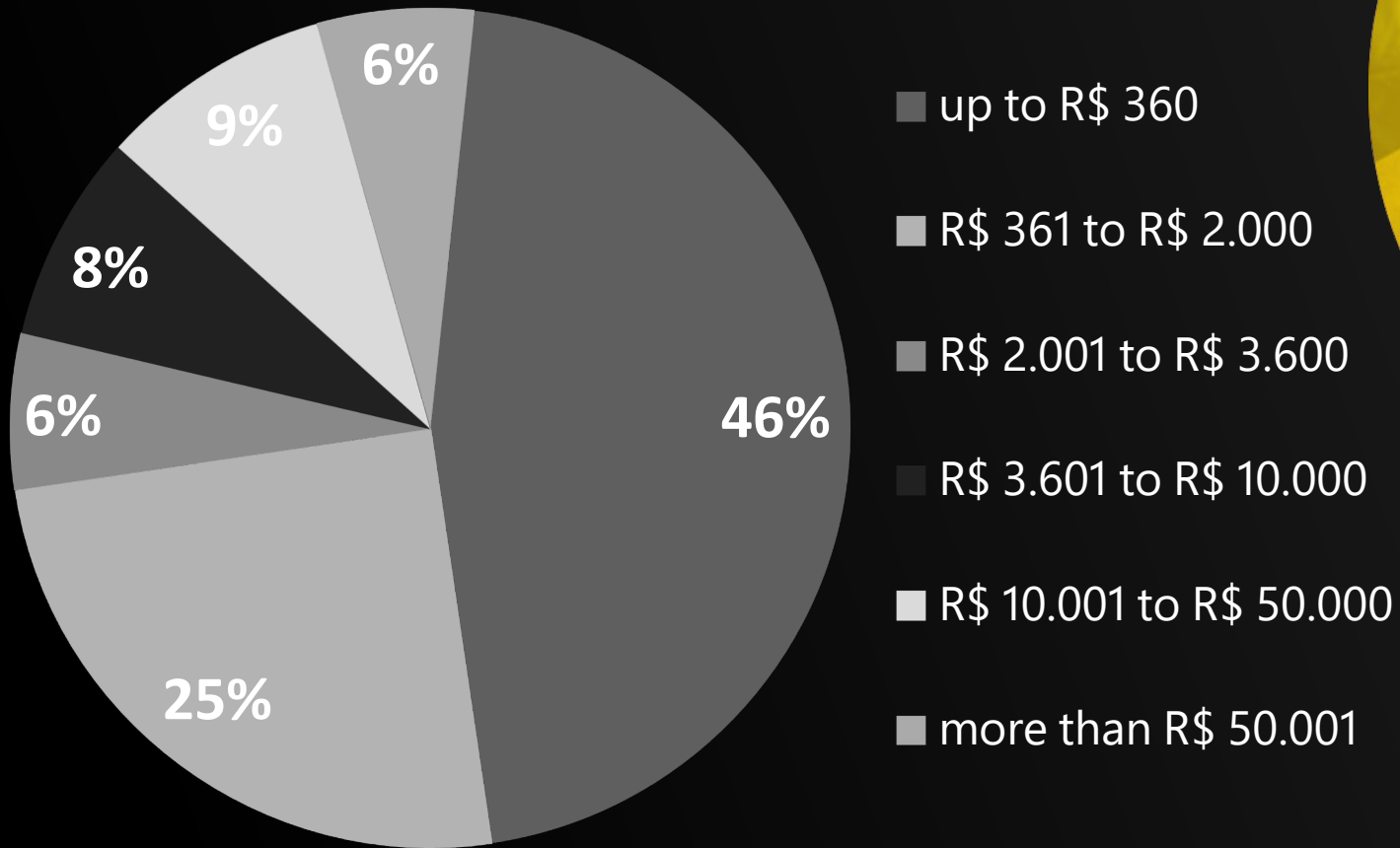
Scenario & Trends

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AFFILIATES PROFILE

Annual Revenue

In thousands of Reais



- **More than 2000 Affiliates (*)**
- **US\$ 18,2 billion in Revenue**
- **200.000 direct jobs**
- **77% of Micro and Small Business**
- **23 States**

(*) including Acate (SC) affiliates



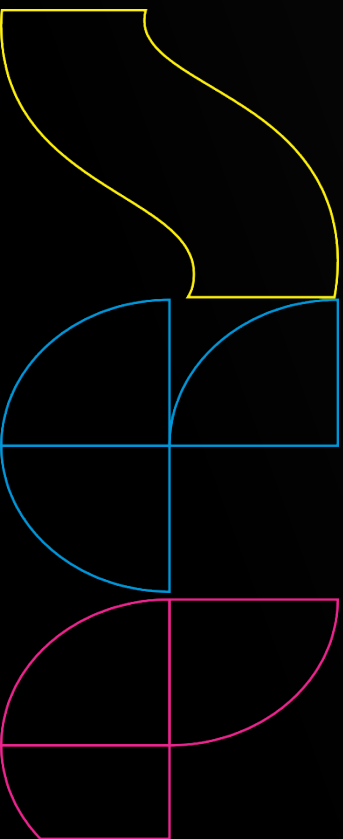
MAIN SERVICES OFFERED

ABES Portal
Legal Advise
Compliance / LGPD Guidelines
Certificates
Health Insurance

Special Interest Committees
Electronic Newsletter / Legal Paper
Entrepreneurship Incentives
Studies and Industry Surveys
Partnership

IT INVESTMENTS 2020

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IT INVESTMENTS IN 2020 – WORLDWIDE

(Software, Hardware and Services)

TOTAL INVESTMENT

INTERNAL MARKET, EXCLUDING EXPORT

US\$ 2,39

Trillion



Source: IDC | Worldwide Black Book, Q4 2020

IT INVESTMENTS IN 2020 – WORLDWIDE

(Software, Hardware and Services)

VALUES IN BILLION – US\$

1ª USA	U\$ 914
2ª China	U\$ 266
3ª Japan	U\$ 145
4ª United Kingdom	U\$ 117
5ª Germany	U\$ 108
6ª France	U\$ 76
7ª India	U\$ 58
8ª Canada	U\$ 53
9ª Brazil	U\$ 49,5
10ª Australia	U\$ 42

OTHERS
U\$ 566

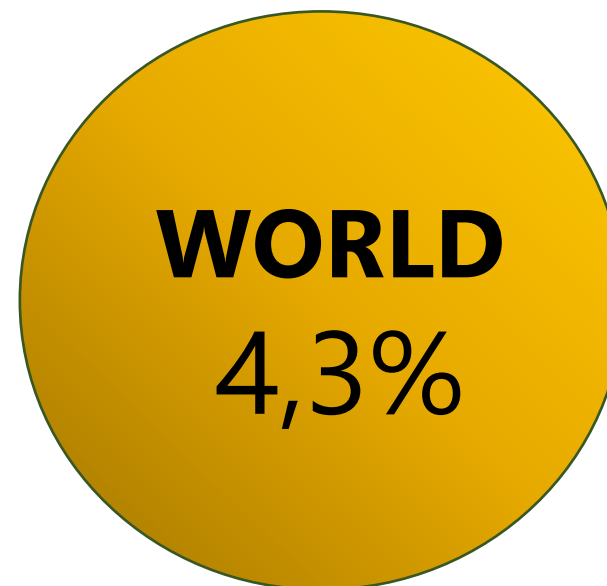
IT GROWTH 2020

(Software, Hardware and Services)



IT EXPECTED GROWTH - 2021

(Software, Hardware and Services)





IT INVESTMENTS IN 2020 – WORLDWIDE (Software, Hardware and Services)

BRAZIL



US\$ 49,5
Billion



Source: IDC | Worldwide Black Book, Q4 2020

IT INVESTMENTS IN 2020 – BRAZIL

(Software, Hardware and Services)

TOTAL INVESTMENT

INTERNAL MARKET, EXCLUDING EXPORT

US\$ 49,5
Billion

HARDWARE

US\$ 26,5 bi

53,7%

SOFTWARE

US\$ 13,0 bi

26,3%

SERVICES

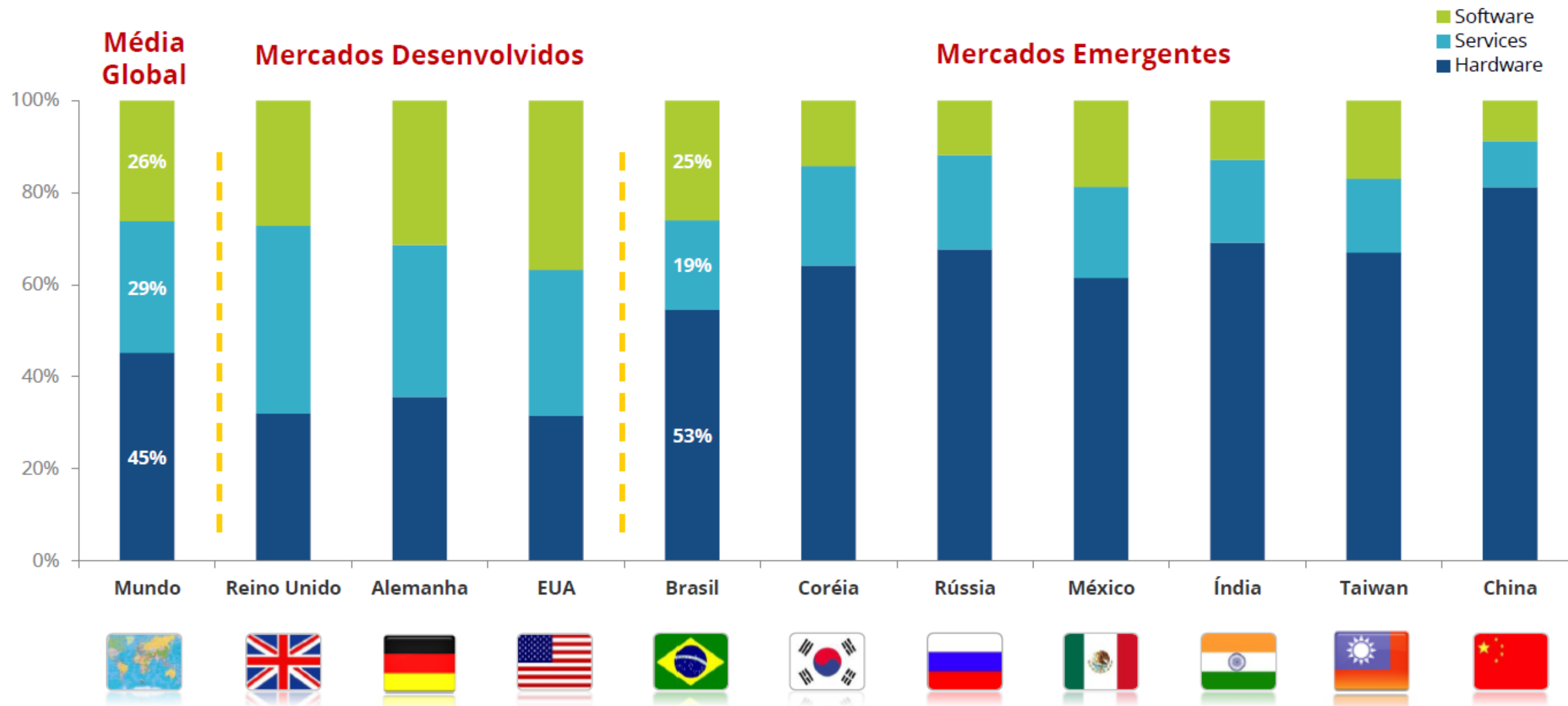
US\$ 10,0 bi

20,0%



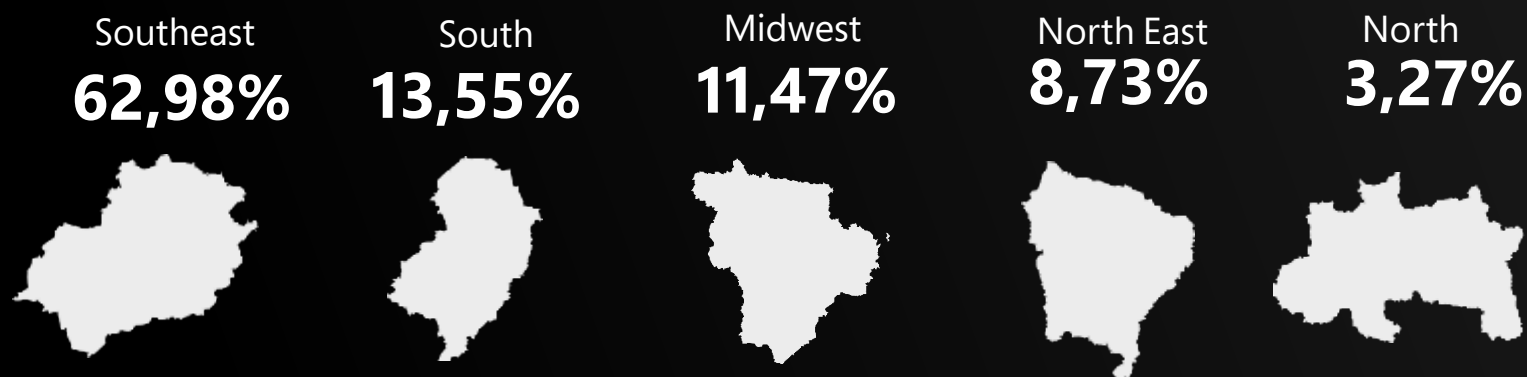
Source: IDC | Worldwide Black Book, Q4 2020

IT Market Maturity - 2020



DISTRIBUTION OF INVESTMENTS IN IT | 2020

Region	Hardware	Software	Service	Total
Midwest	10,99%	11,88%	12,26%	11,47%
North East	9,70%	7,07%	8,32%	8,73%
North	3,66%	2,58%	3,12%	3,27%
Southeast	62,28%	64,87%	62,36%	62,98%
South	13,37%	13,60%	13,94%	13,55%
TOTAL	100%	100%	100%	100%



... INCREASED DISPERSION OF IT INVESTMENTS THROUGHOUT THE COUNTRY

North East

2012	2020
8%	9% ↑

North

2012	2020
2%	4% ↑

Midwest

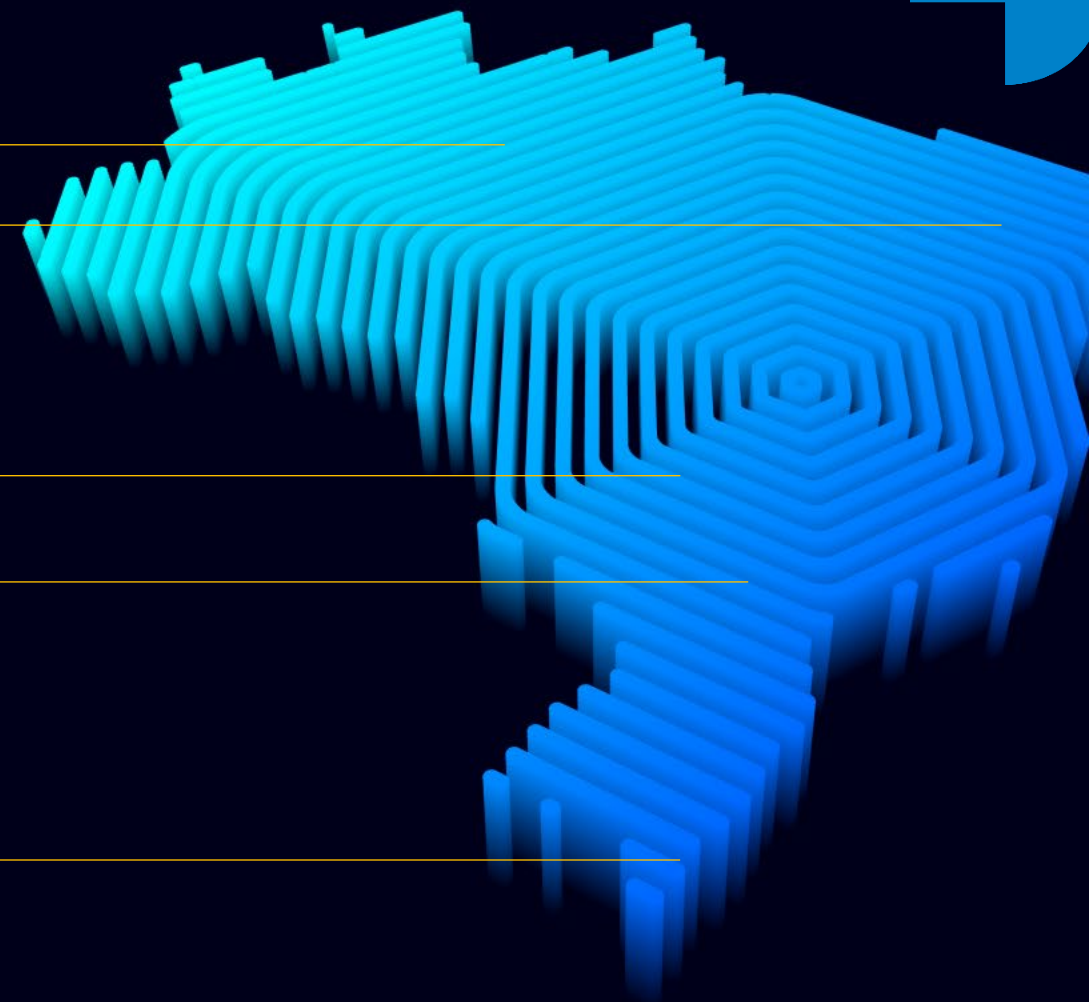
2012	2020
13%	11% ↓

Southeast

2012	2020
65%	62% ↓

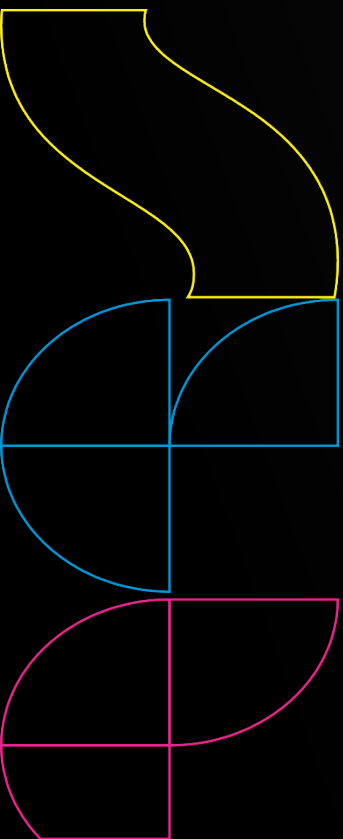
South

2012	2020
12%	14% ↑



SOFTWARE AND SERVICES INVESTMENTS 2020

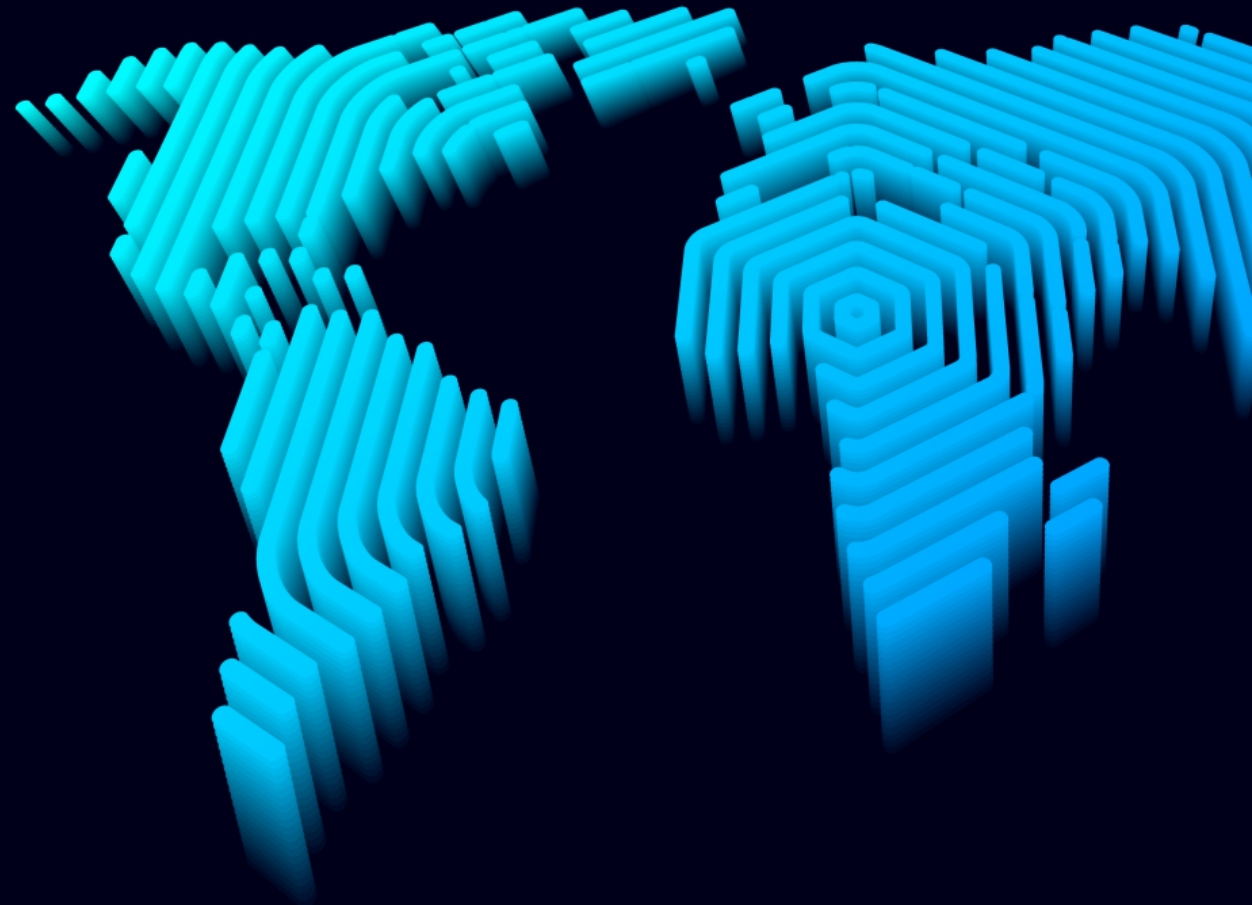
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WW SOFTWARE AND SERVICES MARKET | 2020

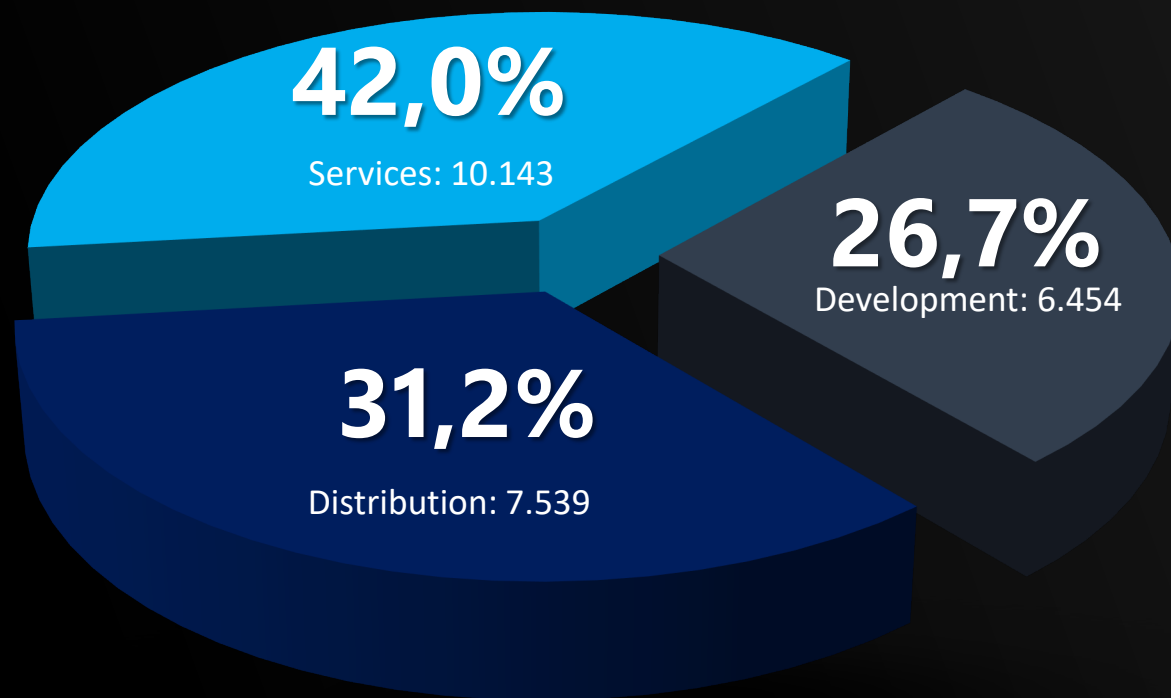
(US\$ Billion)

1 ^a	USA 635 47,1%	10 ^a	NETHERLAND 23 1,7%
2 ^a	JAPAN 84 6,2%	11 ^a	ITALY 21 1,6%
3 ^a	UK 81 6,0%	12 ^a	INDIA 19 1,4%
4 ^a	GERMANY 70 5,2%	13 ^a	SPAIN 17 1,3%
5 ^a	CHINA 53 4,0%	14 ^a	SWITZERLAND 17 1,3%
6 ^a	FRANCE 51 3,8%	15 ^a	SWEDEN 13 1,0%
7 ^a	CANADA 32 2,4%	16 ^a	KOREA 13 1,0%
8 ^a	AUSTRALIA 26 1,9%	17 ^a	DENMARK 10 0,7%
9 ^a	BRAZIL 23 1,7%		
			ROW 162 12,1%



SOFTWARE AND SERVICES COMPANIES | 2020

TOTAL: 24.135 COMPANIES



■ Distribuição ■ Serviços ■ Desenvolvimento

MICRO (< 10 employees)

48,2%

SMALL (10 a 99 employees)

46,8%

MEDIUM (100 a 500 employees)

4,4%

LARGE (> 500 employees)










0,7%

Source: IDC – IT Black Book, Q4, 2020

SEGMENTATION – BUYER MARKET | 2020

(US\$ Million without export)



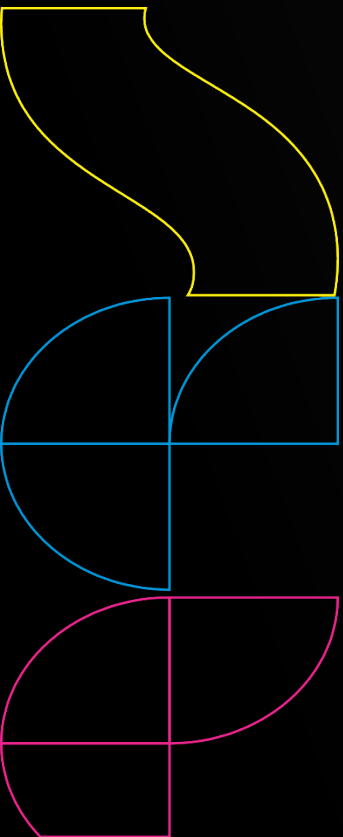
SEGMENT	VOLUME	SHARE	%
Services and Telecom	6.127	 26,47%	14,76%
Finance	5.589	 24,15%	8,02%
Industry	4.254	 18,38%	9,36%
Retail	2.881	 12,45%	28,27%
Public Sector	1.402	 6,06%	7,87%
Oil and Gas	837	 3,62%	9,66%
Agrobusiness	418	 1,81%	9,66%
Others	1.635	 7,07%	18,62%
TOTAL SOFTWARE + SERVICES	23.143	 100%	11,8%



Source: IDC – Worldwide Black Book, Q4 2020

LATIN AMERICA IT INVESTMENTS 2020

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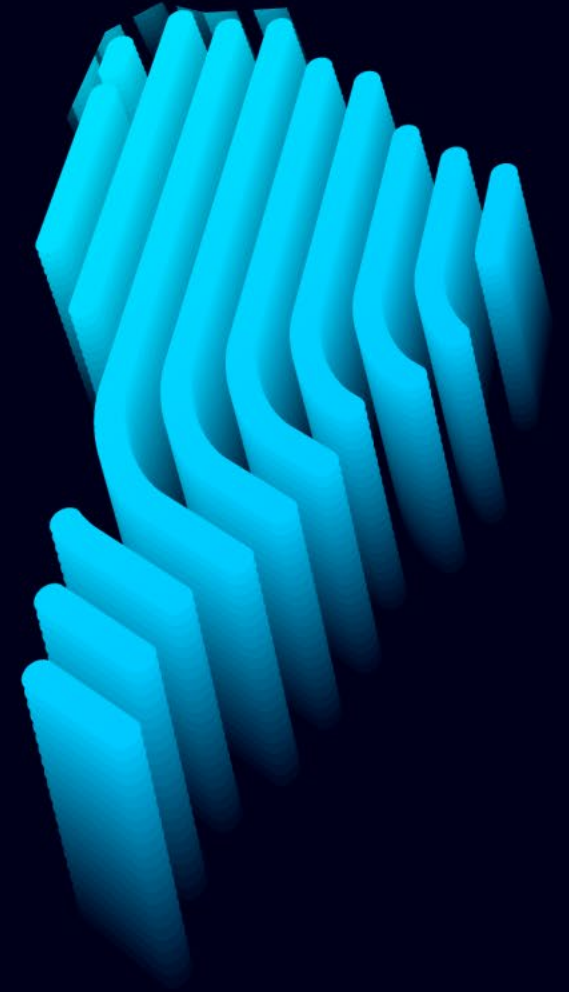


IT INVESTMENTS IN 2020 – LATIN AMERICA (Software, Hardware and Services)

TOTAL INVESTMENT

INTERNAL MARKET, EXCLUDING EXPORT

US\$ 112
Billion



Source: IDC – IT Black Book, Q4, 2020

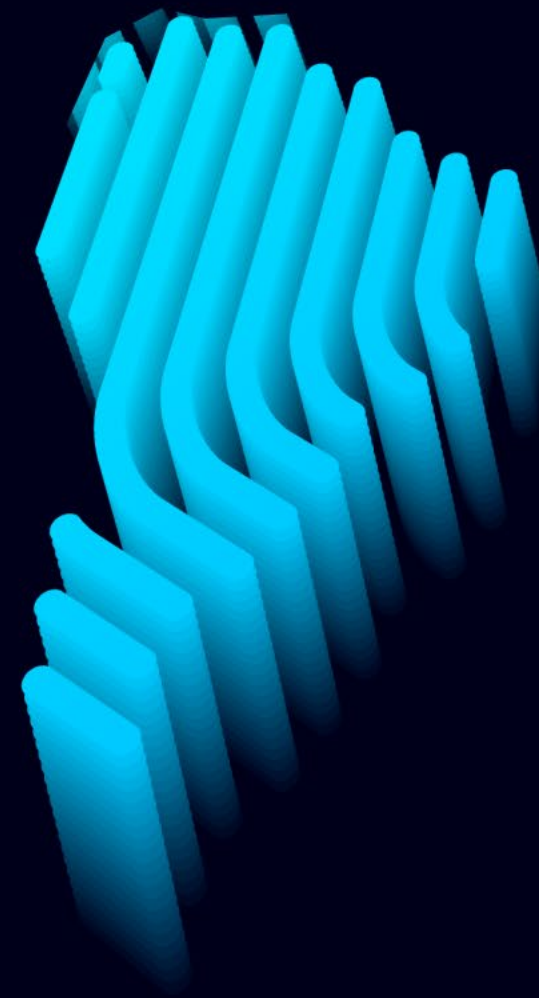
IT INVESTMENTS IN 2020 – LATIN AMERICA

(Software, Hardware and Services)

IT

VALUES IN BILLION – US\$


1ª Brasil	U\$ 49,5	44%
2ª Mexico	U\$ 22,0	20%
3ª Colombia	U\$ 9,7	9%
4ª Chile	U\$ 7,1	6%
5ª Argentina	U\$ 6,8	6%
6ª Peru	U\$ 4,8	4%
7ª RLA	U\$ 12,1	11%
LATAM	U\$ 112	100%



ICT INVESTMENTS (IT + TELCO)

2020

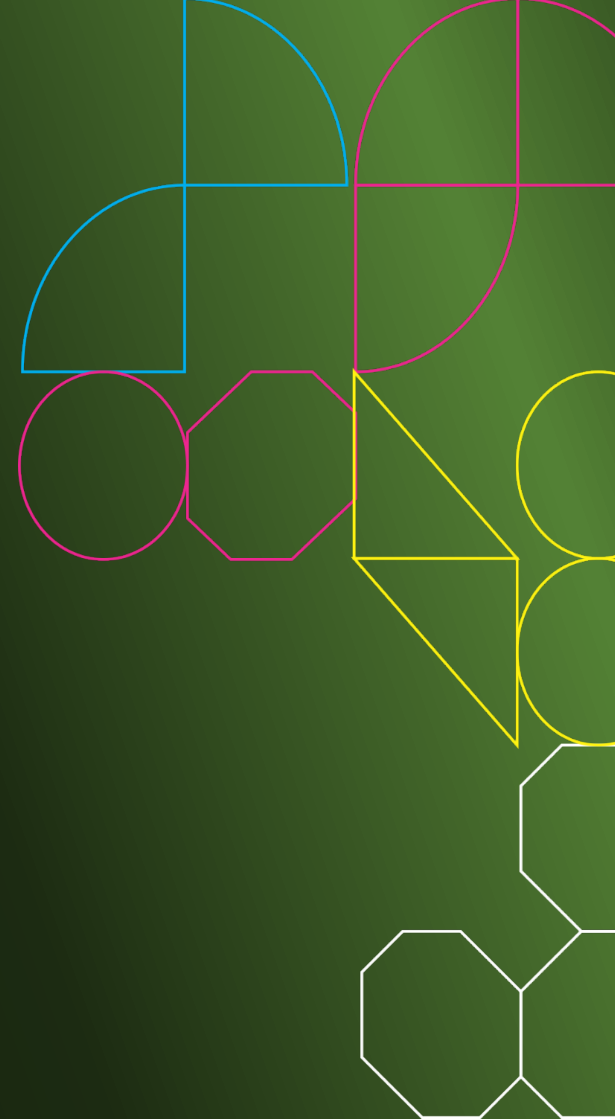
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ICT INVESTMENTS (IT + TELCO) IN 2020 WORLDWIDE

TOTAL
INVESTMENT
INTERNAL MARKET, EXCLUDING EXPORT

US\$ 3,78
Trillion



ICT INVESTMENTS (IT + TELCO) IN 2020

WORLDWIDE

BRAZIL

US\$ 94
Billion

7^a
RANKING

ITC INVESTMENTS IN 2020 – WORLDWIDE

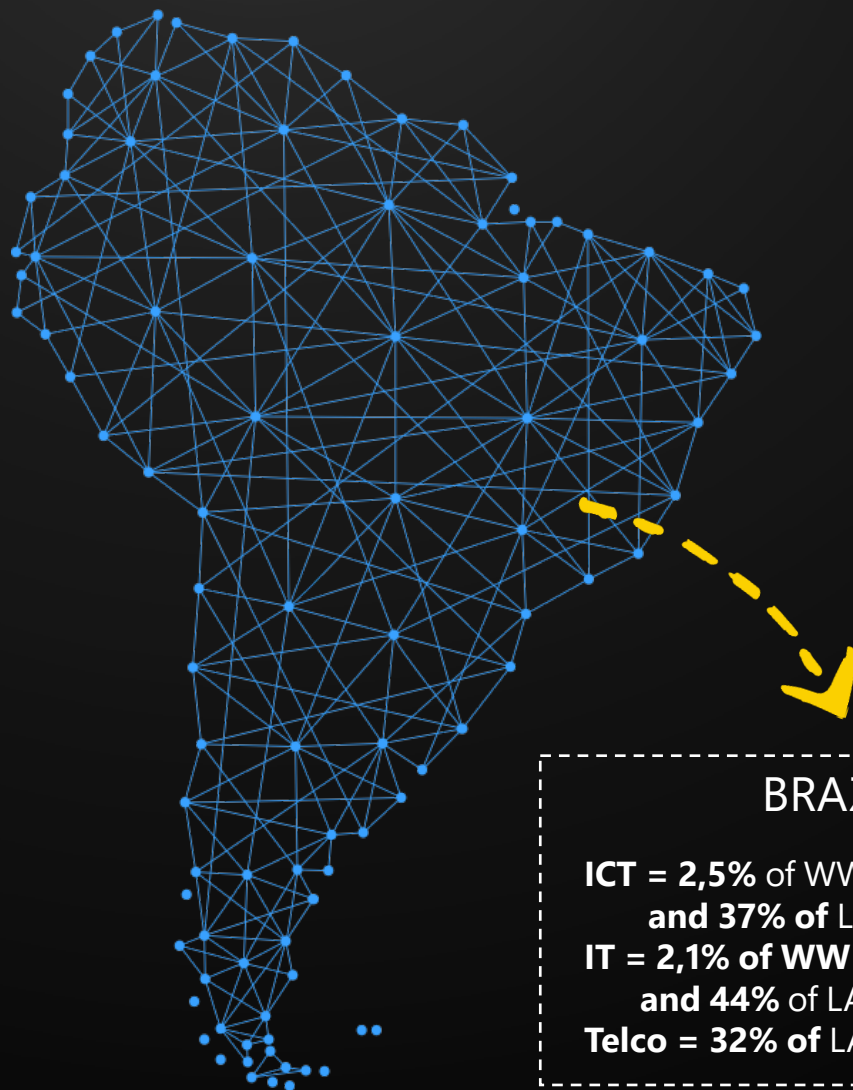
(Software, Hardware, Services and Telco)

VALUES IN BILLION – US\$

1ª USA	U\$ 1.263
2ª China	U\$ 432
3ª Japan	U\$ 247
4ª United Kingdom	U\$ 156
5ª Germany	U\$ 147
6ª France	U\$ 112
7ª Brazil	U\$ 94
8ª Canada	U\$ 89
9ª India	U\$ 80

OTHERS
U\$ 1.160

2020 SUMMARY AND 2021 FORECAST



- Even in a crisis scenario, the **average growth** of the WW IT Industry in 2020 **was 2.5%. Brazil grew more than 22%, reaching US\$ 49,5B.**
- Brazil forecast for 2021:
 - **IT = +11,1%**
 - Following the recent trend.
 - **ICT = +7,1%**
 - Telco will have a small increase in 2021 by +1,9%, maintaining the trend of recent years.
 - **Business IT = +9,7%**
 - Without Consumer Devices.



Thank you,

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