



Latin America Semiannual IT Services Tracker

From emerging outsourcing services models to more traditional project-oriented services engagements, the Latin America region continues to offer IT services vendors significant market opportunities. As an invaluable tool for uncovering and exploiting these opportunities, IDC's *Latin America Semiannual IT Services Tracker* provides vendors with complete market statistics, trends, and forecasts covering 12 services markets. This product reflects IDC's continuing investment in aiding clients with strategic and tactical planning, product management and development, and marketing and promotional activities.

Markets Covered

This product covers the following segments of the Latin America IT services market:

- Major IT services engagement types (analyzed in 12 IT services foundation markets): IT consulting, systems integration, custom application development, outsourcing, support and deploy, and education and training
- Market sizing by country (Brazil, Mexico, and the rest of Latin America), foundation market, vertical market, and horizontal market (company size)
- Five-year market forecast (2005–2009) of each IT services foundation market

Subjects Analyzed

Throughout the year, this product will address the following topics:

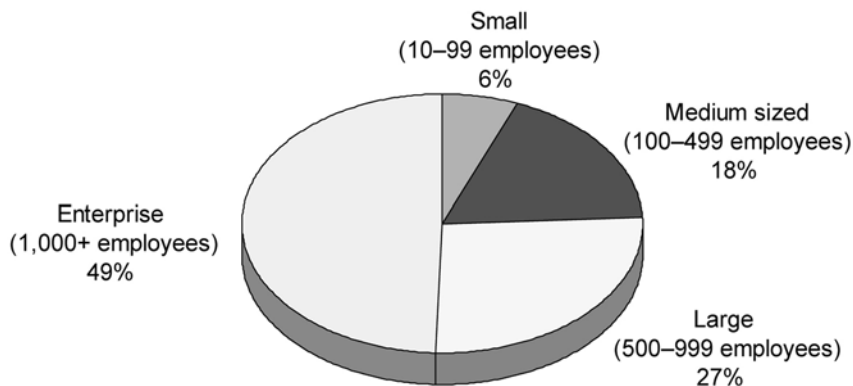
- Market sizing and vendors' market shares for all countries, IT services foundation markets, vertical industries, and company sizes
- Five-year forecasts for the entire Latin America IT services market divided into 12 IT services foundation markets

Key Questions Answered

Our research addresses the following issues that are critical to your success:

1. Where is the overall Latin America IT services market heading, and what are some specific industry trends?
2. Who are the top IT services providers in Latin America?
3. Which outsourcing subsegment is growing fastest — IS outsourcing, application management, or infrastructure outsourcing?
4. What are the most attractive IT consulting and systems integration opportunities today and in the future?
5. Which IT services providers are best positioned to increase their IT services market share?

Latin America IT Services Revenue Share by Company Size 2003



Source: IDC

Competitive Analysis

IDC's *Latin America Semiannual IT Services Tracker* presents semiannual rankings and market share of the major international vendors in the region, plus local vendors such as Intesa, Itaotec, Procwork, Sonda, and Stefanini. International vendors include Accenture, BearingPoint, Capgemini, Dell, Deloitte Consulting, DMR, EDS, HP, IBM, Neoris, Oracle, SAP, Siemens, Sun, and Unisys.

Research Agenda

Throughout the year, this product will offer insight into the latest trends impacting the market. Potential studies include:

Latin America Semiannual IT Services Tracker (2004 and 1H05) — Data

These edeliverables consist of a spreadsheet file with pivot tables.

Latin America Semiannual IT Services Tracker (2004 and 1H05) — Presentation

This product includes interactive, IDC analyst-led briefings.

Product Snapshot

Country	Argentina							
Vertical Market	2001	2002	2003	2004	2005	2006	2007	2008
Banking/Financial Services (insurance, real estate, etc)	27.4%	26.7%	26.4%	26.2%	26.3%	26.3%	26.5%	26.6%
Manufacturing (discrete and process)	20.1%	21.9%	22.4%	22.8%	22.8%	22.8%	23.0%	23.1%
Telecom/Media	17.93%	16.27%	16.1%	16.9%	16.9%	16.9%	16.9%	17.0%
Services (transportation/healthcare/other services)	8.8%	8.9%	8.5%	8.3%	8.3%	8.2%	8.1%	8.0%
Government	6.5%	6.3%	6.5%	6.8%	6.9%	7.0%	7.1%	7.2%
Other	5.6%	6.0%	5.5%	5.2%	5.1%	5.1%	4.7%	4.7%
Commerce	6.2%	5.9%	6.5%	6.3%	6.3%	6.4%	6.4%	6.5%
Oil/Gas	4.8%	5.4%	5.6%	4.9%	4.9%	4.8%	4.7%	4.6%
Utilities	2.8%	2.6%	2.5%	2.7%	2.7%	2.6%	2.6%	2.5%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.00%

Source: IDC

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