



UNLOCKING
THE
SECRETS
TO
INNOVATION

Brazilian Software Market
2016

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CONNECT | PROTECT | ORIENT | DEVELOP

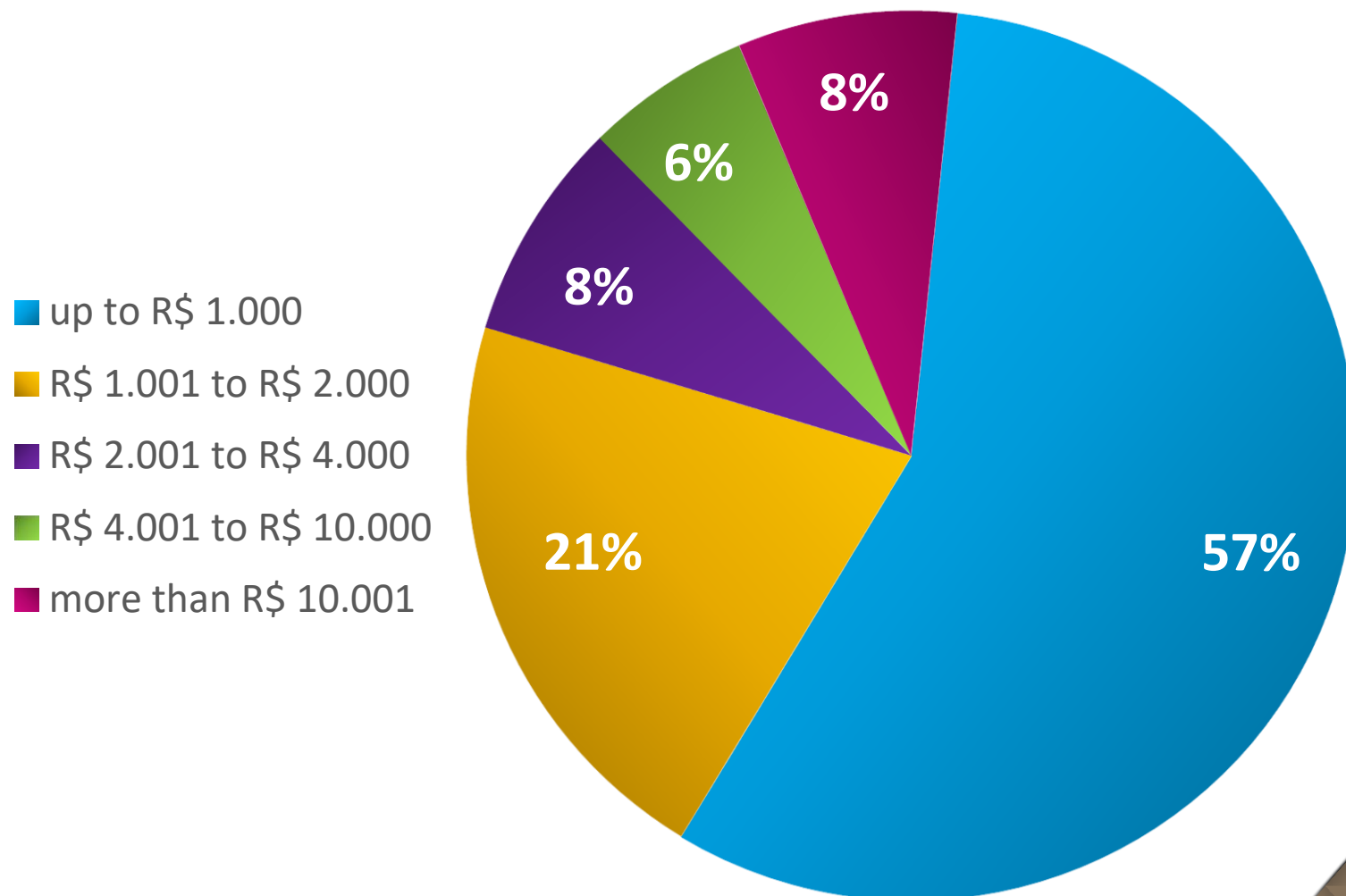
Brazilian Association of Software Companies

ABES in a nutshell

- More than 1,600 Affiliates
- 86% of Micro & Small Business
- R\$ 60 billion in Revenue
- 120.000 direct jobs
- Affiliates located in 24 States

Annual Revenue

In thousands of Reais



▶ **1**

ABES Portal & Hotsites

▶ **2**

Legal Counselors

▶ **3**

Legal Advisors Reports

▶ **4**

Certifications

▶ **5**

Resource Center

▶ **6**

Special Interest Committees

▶ **7**

On line Newsletters

▶ **8**

Business Opportunities Center

▶ **9**

Studies and Industry Surveys

▶ **10**

Partnership



CONNECTED TO:



**Entrepreneurs,
Inventors &
Innovators**

**Research
Institutions**

**Government
Local, State
& Federal**

Media

You

Idea
Screening

Opportunity
Development

Proof of
Concept

Planning
& Pitching

Raising
Capital

Growth

Exiting



**Educational
Institutions**

**Specialist Service
Providers
ie: Accountants**

Investors

Mentors

How entrepreneur see the world?

E tudo que fica pronto na vida
foi construído antes, na alma.

Nizan Guanaes

Problem? Oportunity!



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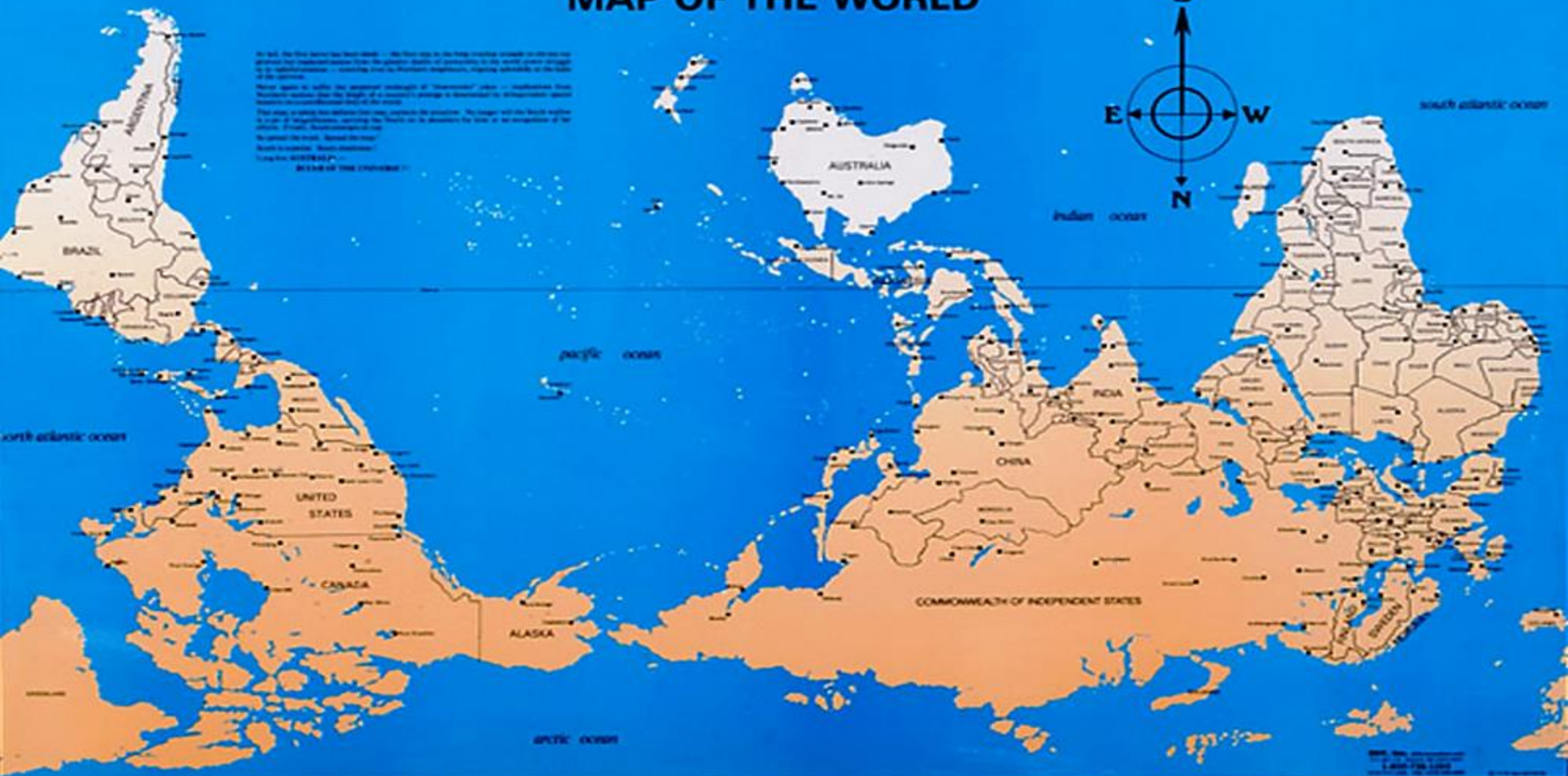


disCONNECT | unPROTECT | DISRUPT | INVENT

Бразильская ассоциация
софтверных компаний

www.abes.org.br

McARTHUR'S UNIVERSAL CORRECTIVE MAP OF THE WORLD



To put the first part of this map in perspective — the first step in the long process of world correction was the removal of the traditional notion that the greater depth of humanity in the world was largely in its population — something that by historical neglect, might actually be the last of its kind.

What steps to make the general meaning of "corrective" clear — implications that humanity means that the depth of a country's people is determined by the population and not by its geographical size of the land.

This step is taking the entire world map, and the position. The map will be made with a map of population, showing the South as it shows the size of an organization of the world. First, the population of the world.

Second, the map, "South America".

Third, the map, "South America".

Fourth, the map, "South America".

Finally, the map, "South America".

BY THE YEAR 2000

STARTUPS THAT WON



IT INVESTMENTS IN 2015



Total IT Investment

(internal Markets, excluding export)

US\$ 2,2 Trillion

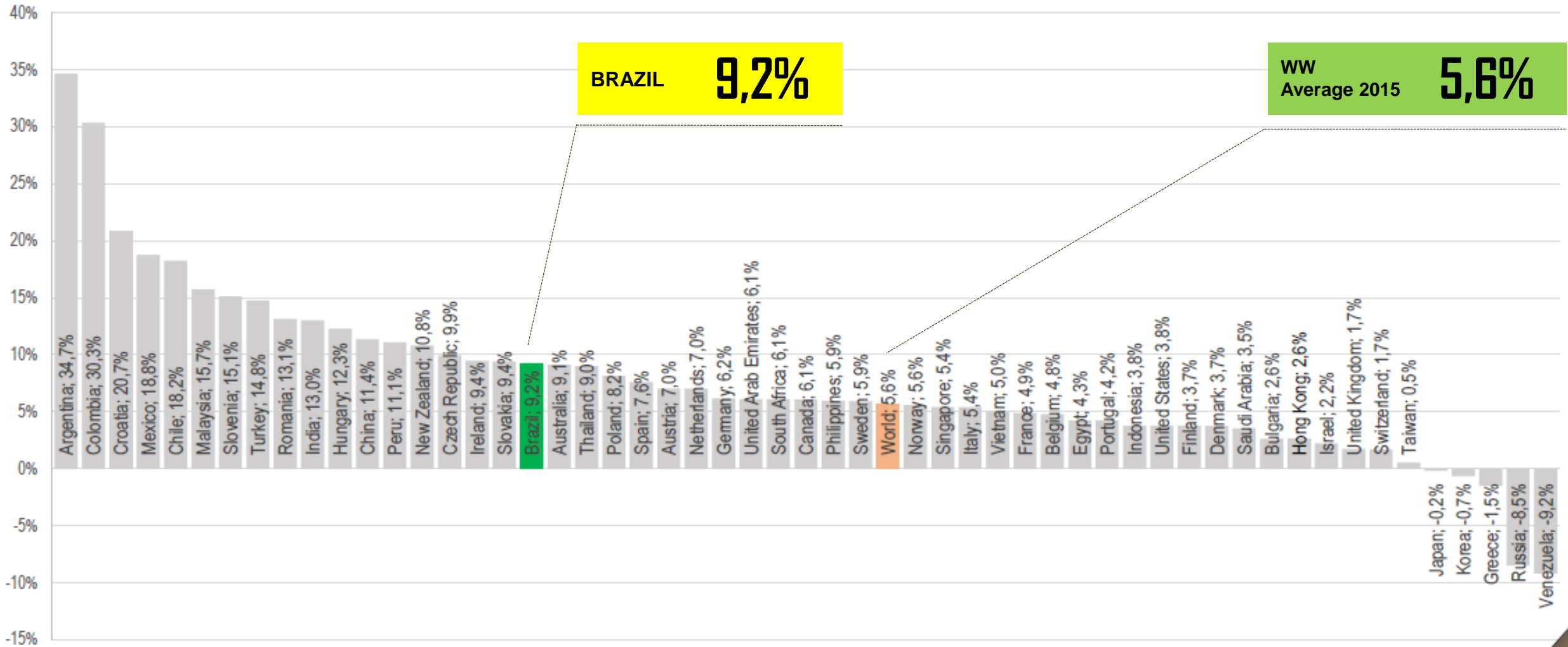
(Values in US\$ billion)

1 ^a	USA - 727
2 ^a	China - 227
3 ^a	Japan - 139
4 ^a	UK - 122
5 ^a	Germany - 107
6 ^a	France - 76
7 ^a	Brazil - 60
10 ^a	India - 43
12 ^a	Korea - 32
15 ^a	Russia - 27
Others - 688	



WW IT Growth - 2015

(Software, Hardware and Services)



Total Investment

US\$ 133 Billion

(Values in US\$ billions)		
1 ^a	Brasil – 59,9	45%
2 ^a	México – 26,8	20%
3 ^a	Colombia – 10,2	8%
4 ^a	Argentina – 9,1	7%
5 ^a	Chile – 7,9	6%
6 ^a	Peru – 4,9	4%
7 ^a	Venezuela – 2,7	2%
8 ^a	RLA – 11,4	8%
LATAM – 132,9		100%

 **B R A S I L**

45 %

Internal Market without Export

US\$ 60 Billion

Hardware US\$ 33,5 billion

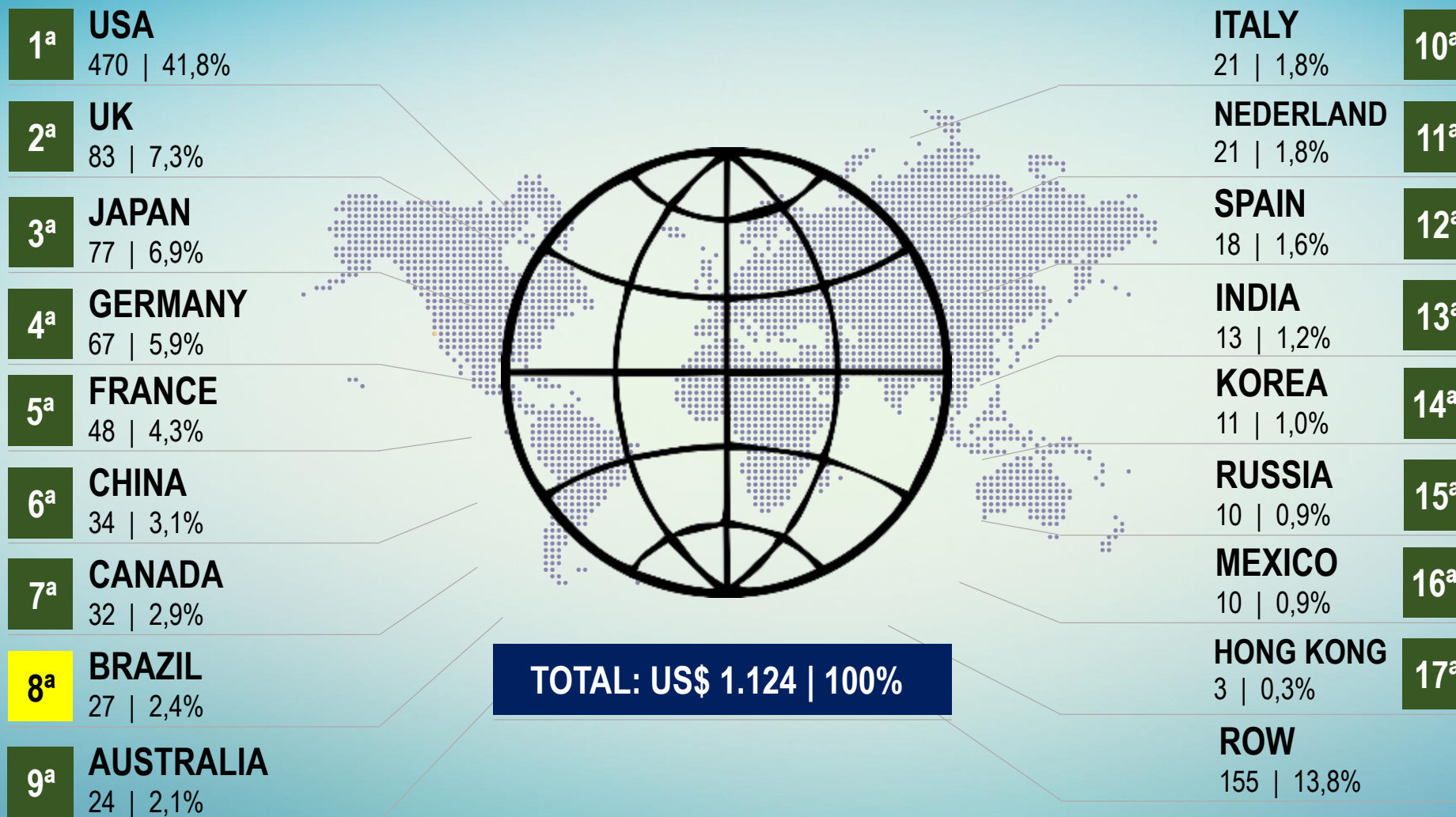
Services US\$ 14,2 billion

Software US\$ 12,3 billion



WW SOFTWARE AND SERVICES MARKET | 2015

(US\$ billion)



Global ICT Total =
(internal Market excluding export)

US\$ 3,7 trillion

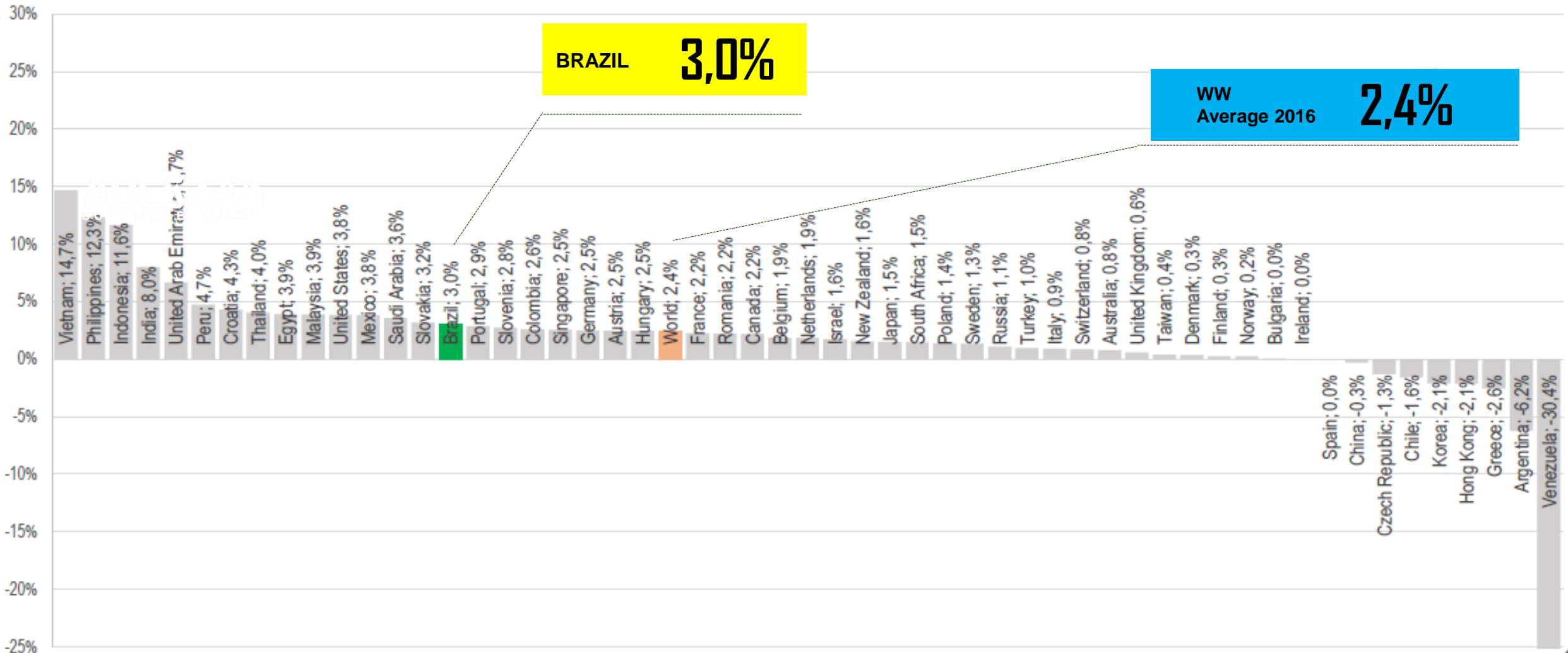
(Values in US\$ billions)

1 ^a	USA – 1,038 T
2 ^a	China - 418
3 ^a	Japan - 241
4 ^a	UK - 172
5 ^a	Germany – 154
6 ^a	Brazil - 152
10 ^a	Índia - 70
13 ^a	Korea - 62
14 ^a	Russia - 56
Others – 1,331 T	



RANKING
6^a

\$152 billions



The image features a modern office interior with large windows. In the foreground, the silhouettes of six business professionals are visible against the bright light from the windows. On the left, a man in a suit stands facing right, a woman in a business suit stands facing him holding a tablet, and another man in a suit stands facing her. On the right, three men in suits are engaged in conversation; one is looking at a smartphone. The floor is highly reflective, mirroring the silhouettes of the people. The overall color palette is dominated by blues and greys, with the bright light from the windows creating a high-contrast scene.

GUIDELINES AND PROPOSITIONS

PROPOSALS TO STRENGTHEN THE INNOVATIVE BRAZILIAN IT INDUSTRY

- 1** Increase resource funds for seed money, development and innovation
- 2** Facilitate loans without collateral: Guarantee Funds
- 3** Discussion of themes of interest
- 4** Public policies: long term - predictable – clear - simple - transparent - objective
- 5** Relationship between government, industry and universities should be trustable
- 6** Communicate and Award Success Cases
- 7** Communications of Government Programs (BNDES, FINEP, CNPq)
- 8** Decentralize incentives using regional agents and incubators.
- 9** Long lasting Programs, greater is the possibility of use by the entrepreneurs
- 10** Increase some Tax Incentives for Innovative Companies



THANK YOU

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President & CEO

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