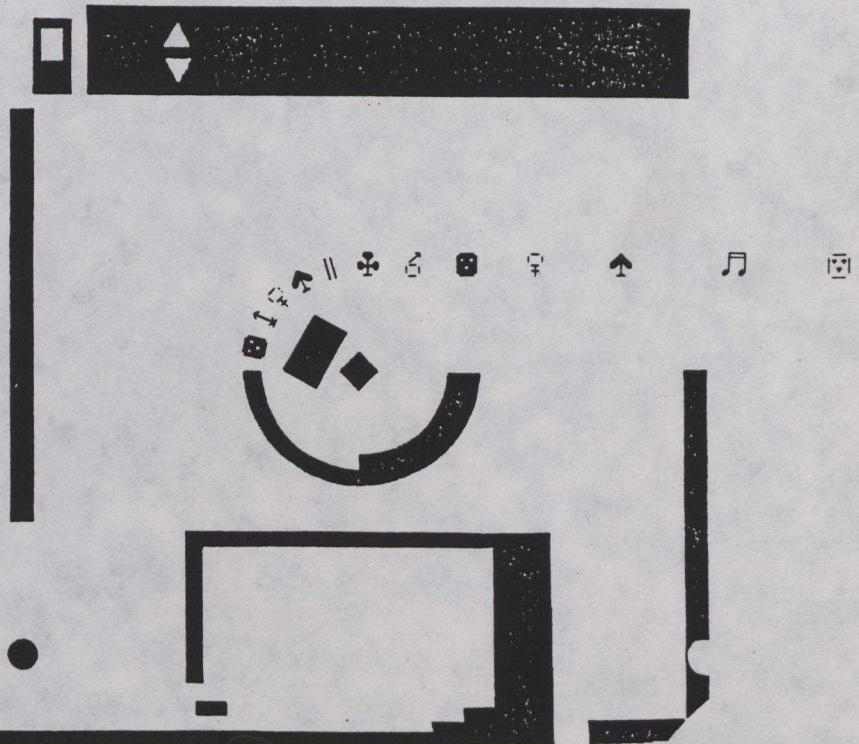


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THE ARGENTINE SOFTWARE MARKET

January 1992

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# **The Argentine Software Market**

**by**

**Southecon Assocs.**

**(for The Canadian Embassy in Buenos Aires, Argentina).**

**January 1992**



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## The Argentine Software Market

This report on the Argentine Computer Software Market was researched and written by Southecon Associates for the Canadian Embassy in Buenos Aires, as part of the Canadian Government program of Market Studies\*. You may write to us in Argentina at:

**Southecon Assocs.**  
Contact: Patricia L. Gomez Aguirre  
Sarmiento 459- 2do Piso  
1041- Buenos Aires  
Argentina

**Canadian Embassy**  
Contact: Commercial Section  
Tagle 2828  
1425- Buenos Aires  
Argentina

or you may contact us by phone at:

**Southecon Assocs.**  
Country code: 54  
City Code: 1  
Ph. #s: 325-1505; 325-1494;  
Fx #: 325-3843

**Canadian Embassy**  
Country Code: 54  
City Code: 1  
Ph. #: 805-3032  
Fx #: 806-1209

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# The Argentine Software Market

## I. Introduction

Since 1989, the Argentine software<sup>1</sup> market has been experiencing an unprecedented growth rate. Annual rates of 100 per cent or higher have become usual in several market tranches, and as of yet have shown no signs of slowing down. This is especially so in the market for personal computer software and also, to a large extent, in the market for mini computers software. For the time being the demand for mainframe software slowed because of the wanting state of the finances of government, its largest user. This market, though, is expected to rebound by 1993, when the privatization process of government corporations is completed.

The reasons for the present market boom can be traced back both to the brutal cost cutting forced by the 1989 hyperinflation and to the recent lifting of massive import restrictions. During hyperinflation, corporations shed personnel by the hundreds and adopted computers as a way to keep a minimum level of output productivity. In 1991, however, a comprehensive restructuring of economic policy succeeded in reducing inflation rates to 1.5% monthly. Economic growth resumed at a 6% annual rate. Corporations responded to the newly increased levels of demand by reorganizing themselves and buying more computers, rather than employing new people. Finally in October 1991, the continued growth of the economy and expectations of a controlled inflation rate, caused companies to begin hiring new employees. These new employees, however, now needed to be equipped with computers too, in order to fit into the emerging office landscape. The same companies which bought the computers during the times of hyperinflation and personnel cutbacks are now looking for software which will quickly make their new workers more productive, in order to take advantage of the new business opportunities mushrooming around the country. These new opportunities are due to privatization of public utilities, oil and gas resources, communications and transportation, as well as to the new market niches that are appearing because of the elimination of trade restrictions and the liberalization of the Buenos Aires capital markets.

## II. Historical Background

During much of the 1970s and all through the 1980s, Argentina strengthened its policy of economic isolation, in force since just after World War Two. High tariff barriers, quotas, and trade prohibitions were common in all sectors. Computers and software were among the most restricted items. As a direct result, software piracy became the main source of small and medium sized firms for Operating Systems, Applications and Utilities. The methods of obtaining hardware was in many instances equally oblique. Large corporations during this period were burdened with increasingly obsolete large mainframe systems, characterized by a computing environment similar to that of the 1960s in the USA, eg. Cobol programmers and data entry personnel functioning in specially refrigerated rooms.

Innovation in the 1980s came from marketing arrangements; in order to lower fixed costs, large corporations adopted the policy of making their in-house 'computer centers' work freelance contracts for medium sized firms. Another characteristic of the 1980s was that Government, at all levels, signed huge contracts with IBM and its local distribution net. Some of the contracts were negotiated using the freelance services of the large corporations' computer centers. Those contracts came under heavy criticism in the 1990s, because of the exceptionally high prices (several times above established market prices for similar services for non-governmental organizations), high maintenance costs, and the lack of satisfaction with the results obtained. These contracts remained popular, however, with computer departments in Government and their employees, since most of these departments originated with them.

The heritage left by the way computerization began in Argentina still pervades the market. The PC environment continues to be riddled with piracy. Entrenched mainframe departments in Government and big corporations still have very strong ties and loyalties to IBM solutions and Cobol code writing.

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Notes: (1) Quantitative and qualitative data was collected by interviewing 20 Argentine software firms which belonged to different market segments, most key government officers and authorities of software trade associations.

### III. Supply and Demand

#### a) Supply

In 1990 the Argentine government recorded the existence of 300 software firms, 200 of which are located in the Capital city and environs, and 100 in the provinces, centered for the most part around the cities of Cordoba, Tucuman, Bahia Blanca, and Mendoza. The reported total sales of these firms was at the time US \$300 million.

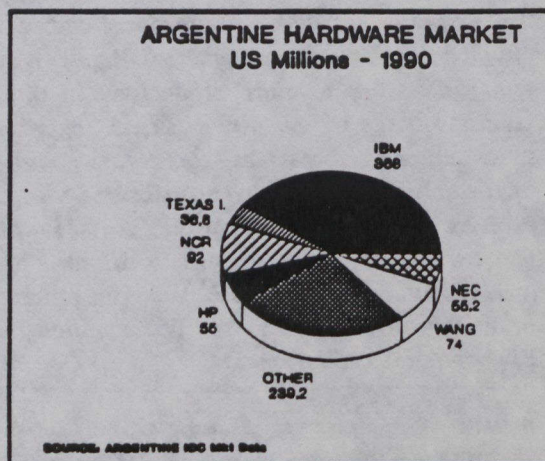
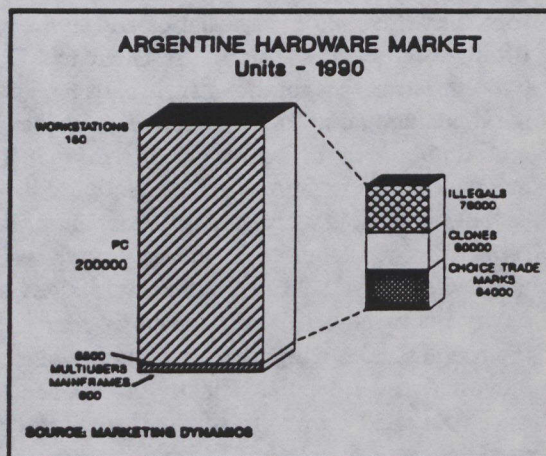
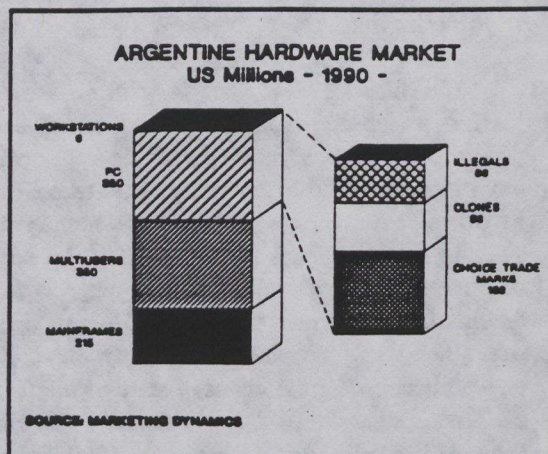
Of the total 300 firms, about 30 are considered to be large firms, with average annual sales in the range of US \$2 million. Another 60 are considered mid-sized, with average annual sales in the range of US \$200 thousand to US \$600 thousand. The rest are small sized firms.

TOTAL SOFTWARE SALES-1990- in millions of US\$		
Size of Firms	# of Firms	Sales
Large	30	130
Medium	60	80
Small	210	90
<b>TOTAL</b>	<b>300</b>	<b>300</b>
Source: U.N.D.P.		

Software firms share the market with free-lance programmers and programming analysts that produce "tailored" software for business firms. The free-lance programmers charge an average of US \$1200 per month, while the programming analysts charge US \$2400 per month.

The supply side of the market has been reported as extremely competitive. Very low profit margins prevail for packaged software due to competition from the USA grey market. This fact, in addition to rapidly occurring technological changes, the economic restructuring, now under way, is having a winnowing effect on the structure of supply.

SOFTWARE SALES RANGES-1990- by size of firm in thousands of US\$	
Size of Firms	Annual Sales Range
Large	2000
Medium	200-600
Small	25-50
Source: U.N.D.P.	



Firms which cannot adapt quickly to the new situation are expected to go bankrupt.

b) Demand

Software firms interviewed reported an increase in demand during 1991 ranging from 10% to 400%. A weighted-by-sales average places the increase at 25%-30% for 1991 and at a projected 40%-50% for 1992. They also reported a demand driven market, with buyers increasingly reluctant to take simply what is offered, at face value.

Software sales forecasts for the total Argentine market are difficult to produce because of lack of appropriate statistics. Nevertheless, forecasts of expected computer sales, as contrasted with past sales, provide a basis for inferring future software demand:

\* In 1990, total computer sales were US \$921 million, of which mainframes accounted for 23.3% of total.

\* In 1990, 200 thousand PC units were sold, in comparison to 600 mainframes, and 6500 multiusers units.

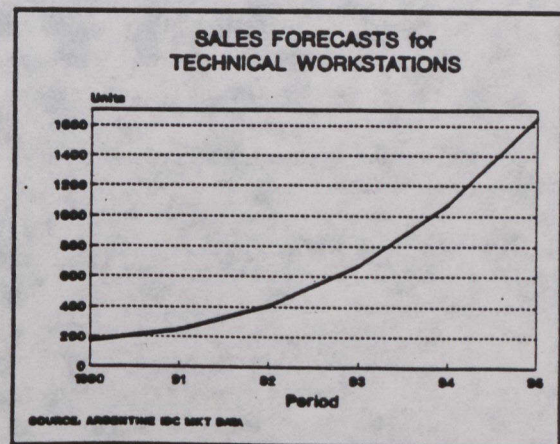
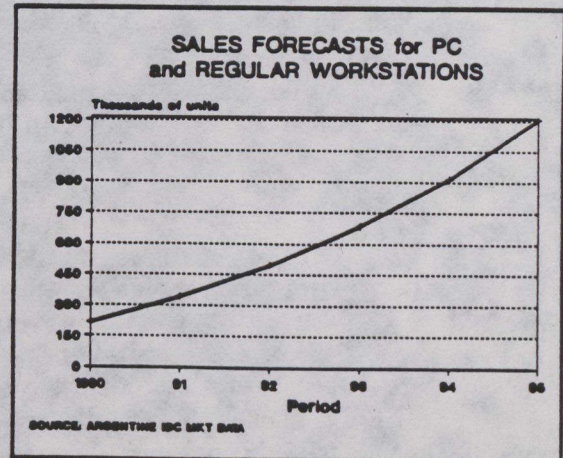
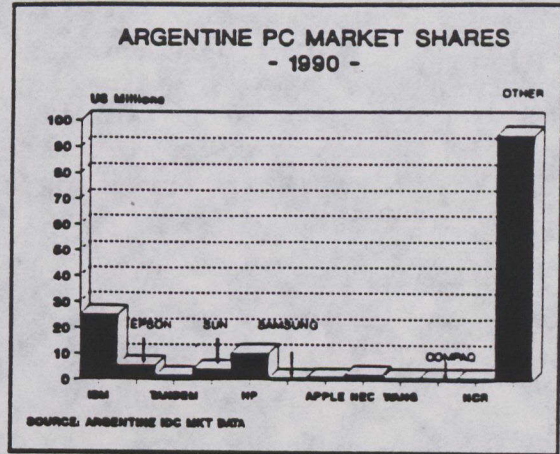
\* 1991 forecast for PC sales is 340 thousand units, a 70% increase with respect to the previous year. For the period 1991-1995 the forecasted increase in unit sales is 460% (base year used is 1990).

While it is difficult to obtain reliable statistics for the total Argentine software market, estimations for some software market tranches are possible:

\* The Management & Accounting Software market, estimated at US \$18.6 million in 1990, is projected to be US \$25.7 million in 1991.

\* The market for Packaged Database Software, in 1990 was reported to be about 2300 units. 1000 of them were sold by Fox, 600 by Dbase, 300 by Clipper and 400 by local software houses. In 1992 it is expected to grow by 40%.

\* The market for spreadsheets is dominated by Lotus, which apparently sells about 3000 units a year. Borland sold about 800 packages in 1991 and expects to



grow twofold in 1992.

\* A market study by Prince, Cooke & Assoc shows that 13% of firms have Open Architecture software installed. There is no difference between large account firms and medium sized firms in this demand niche.

### c) Market segments

Supply segments, as perceived in the local market, are:

i) Representation firms: they have an arrangement with a software development house at home or abroad and are in charge of controlling the distribution of a licenced software in the whole of Argentina and arranging for the technical support in this country.

ii) Distributors and wholesalers: They are appointed by the firms that have the representation contract.

iii) Computer systems consultant firms: They design the computer and software purchasing policy of client firms according to the perceived needs. They also offer a number of related services: training, technical support, network maintenance, etc.

iv) Software developers: They develop tailored or packaged software.

v) Integrators: they offer various combinations of the above categories plus hardware.

Demand segments as perceived in the local market are:

i) Large accounts. These would be large corporations buying more than ten licenses per software package. They usually buy according to established guidelines and standards and are not very keen on trying new products based on their perceived merits. Many of them are

branches and subsidiaries of multinational corporations, so standards are set by the corporation headquarters abroad. They usually prefer to deal directly with the software house or its local representative. They are less concerned with software prices than buyers in other market segments, but very demanding when it comes to technical support. IBM hardware dominates the scene, selling them 75% of mainframes, 36% of minis and 60% of PCs.

ii) Medium and small sized firms. They typically buy less than 10 licenses per software package. They accept non-standard new products if they come to the conclusion that it solves their computer problems. But they take a very long time to decide, and they buy only what they can thoroughly test. They usually buy from distributors and price is an issue. IBM hardware leads this market segment, but less notoriously than in the large accounts segment. Wang dominates the mainframe tranch; IBM provides 40% of minis and 15% of PCs.

iii) Micro firms. There are two types of them. The first set, characterized by very high computer skills, prefers to deal directly with the software house representative in the country. They tend to get very involved with the technical support group of the software firms. As they are one of the best informal channels of propagandizing products, they are usually very welcomed by firms here. The rest of microfirms, in general, resort to pirating copies due to the high software prices prevailing in the local market.

### d) Strengths and weaknesses

The main strength of the Argentine market is the growth rates that it is undergoing and the

forecasted sales for the next five years. This is particularly reinforced by the fact that a rainbow of new business opportunities is appearing due to i) the reorganization of federal and provincial governments; ii) the privatization of a large number of government corporations which as a result are acquiring new management groups that in many cases sever ties with the corporations' traditional suppliers; iii) the opening of the economy, including the capital market and the revitalization of the traded-goods sector.

The Argentine market is also considered to be an entrance door to other Spanish speaking countries and to the Brazilian market. Locally developed bilingual and trilingual (Spanish-Portuguese-English) software is starting to appear. Accounting systems that work in more than one currency simultaneously as well as software that produces files simultaneously in more than one language are now being researched.

A high degree of sophistication in analysts and programmers coupled with low costs for local software development, benchmarks research as well as beta tests are an additional advantage for certain business projects and an area that has hardly been exploited.

The main weakness is the market scale. The number of software packages that can be sold in Argentina will always be small. The lack of computer culture forces the representation office and sometimes even the distributor, to keep a large number of employees dedicated to technical support. This is an expensive service and software firms want to charge this cost to those buying the package and not only to those who request the service. In this way, they cannot compete against very low prices prevailing in the USA grey market. Furthermore, the resulting high prices charged makes it difficult to fight piracy and to expand the market in the middle sized to small sized firms niche. Finally, finding partners or firms that will adequately represent products is rather involved. It should also be noted that to set up a distribution net in Argentina is difficult as good distributors are hard to find.

#### IV. Market Trends

##### a) The market for PCs.

Abstract: PCs will spread very fast across corporate Argentina, with LAN and Windows based software as the main staple. Unix will also grow, but at a lesser rate because of the lack of products. Some

interesting business in government is possible.

Downsizing (shifting from mainframe to PC) and/or implementation of LAN and Peer-to-Peer solutions, will dominate the market. There are four structural reasons for this: a) the lowering of tariffs and other trade barriers is forcing corporations to reshape their general cost structure once again, in order to compete, b) the lack of investment funds in the country (PC's take much less initial investment funds), c) the new and inexpensive i486 technology with large disks, makes the PCs an ideal solution for the prevalent size of business firms here, d) PC imports are now sold in Buenos Aires at USA list prices and are readily available all over the country.

The PC software market is rapidly moving away from the combination of "tailored" plus packaged software into the packaged-only software. Several software firms have changed their strategy and are now trying to introduce very user friendly packages. Their rehauled operation is moving towards less employees and automatized or systematized after-sales support, such as support via diskettes, phone-consulting and modem-consulting in place of personal on-site visits. Initial training courses, however, taught by these same firms are increasing. The customer wants to buy autonomy, rather than feeling continually dependent on the software salesman. Since teaching fees are inexpensive, given the prevalent type of employment contract for teachers in this market, the arrangement is very cost efficient.

Government should also be considered as a potential client for PC software. The economic restructuring at the federal government level calls for reducing federal employees from 1.1 million to 350 thousand. PC's will begin to spread in use to fill in for the personnel cutbacks. Software packages for office automation, software specific to management of some government operations and training, should be major growth areas starting around mid '92 and will probably continue as a growth segment for the next three years.

According to Juan Franchino, the Undersecretary for Information Systems, opportunities in government will be centered around the Ministry of the Economy, Customs, the Revenue Office (DGI), the National Registries Systems (car ownership, real estate ownership, immigrants, citizens & other residents, social security and registered workers) and INDEC (National Statistics Institute).

Another market segment which should be considered as a potential client for PC software are the Argentine corporations which will be facing new competition from imports. The opening of the economy is now forcing industrial corporations to consider measures to trim production costs. Real time applications are envisioned as an area with great potential in aiding the corporations in this process. The niches which look to have the greatest growth potential are industrial plant automation, robotics, warehouse automation, telecommunications and SCADA. Intelligent buildings are said to be a too sophisticated technology at this time, but some firms, even so, are starting to research it after the Alto Palermo Shopping Mall, Buenos Aires' newest, incorporated this technology. It is estimated that a market for intelligent buildings will be opening up in two years. Additionally, banks are undergoing a brutal restructuring and real time applications are beginning to be introduced in this sector. From the point of view of joint ventures with foreign firms, the translation and editing of programs and user guides and the organization of distribution of software in Latin America are expected to increase markedly. The same applies to benchmark tests and beta tests.

An additional interesting business niche is finding a partner or commissioned agent that on top of undertaking the Spanish translation and editing of a software package would also be in charge of reproduction, packaging and distribution logistics for Latin America and Spain. Some corporations have started on this path and this type of operation is expected to increase in the next years.

#### b) The market for mainframes and minis

**Abstract:** Mainframe and Minis sales will grow in the private sector and be focused in communications and large database storage applications. But some government related business remains.

Opportunities for large data storage and interoperability are appearing in the newly privatized government corporations. Among the most important privatization areas are: public utilities (water supply, electricity generation and distribution, natural gas distribution); coal, oil and gas resources; railroads; cargo ships (including the government oil fleet); seaports; telephones; cellular phones; satellite communication, city sanitation systems; city parking control; city tax billing; provincial roads (the road system is converting to a toll road system); and a large number of firms

belonging to the Defense Ministry, chemical and metal processing corporations that produce strategic materials. In addition, the Buenos Aires capital market has finally taken off, creating a desperate need for networking capabilities within the stock exchange, the commodities market, as well as money and currency markets, all of which are growing very fast.

Communications software opportunities will mainly come from the newly privatized mammoth government corporations. But, another segment which should not be overlooked are the businesses which are outside the capital area. Argentina, very much like Canada in some ways, has a large land area scarcely populated. The new market oriented economic organization is bound to produce more businesses in the outlying provinces. These businesses, in order to function, will need to maintain fluid contact, not only with Buenos Aires but also with clients around the world.

Software products aimed at specific industries, if focused on fast growing local industrial sectors, will be a good, solid niche for the next two years. The non-alcoholic beverages industry, the insurance industry, the oil industry, the petrochemical, the car industry and the domestic electronics assembling industry, are all expected to be best-sellers in 1992. Of the above mentioned sectors, the most important for their growth rate in software demand are the oil industry and the insurance industry. Both sectors were fully deregulated during 1991 and are growing very fast now and are expected to be among the list of very dynamic sectors for the coming decade. Project supervising software, particularly related to the construction industry, but also across the board, is also expected to be very popular.

#### V. Keys to Market Success

The Argentine computer market started to develop 10 to 15 years behind the USA market. As a result, user knowledge of software for the PC and mainframes has not matured in parallel with the gradual sophistication of the North American market. The opening of the market to the latest technology imports, therefore, makes training support for the client's employees a crucial item in the sales pitch. Firms are reluctant to buy older technology, because they feel they are being cheated. Yet, they face insurmountable difficulties with the new generation software because the computer culture is not there. Given this environment, software firms that have satisfactorily solved the technical and training support problems

are the ones that succeed. This support is currently offered in three ways: a) training by the firm selling the software: this means both organizing a training facility that includes space for course teaching and preparing your software account managers to give preliminary after sales technical support, b) selecting and recommending a firm to supply the after sale support and c) finding an alternative way of support, such as consulting via modem or sending demos and training diskettes.

Two additional strategies have proved adequate to overcome the lack of computer culture:

- a) Offering 'user friendly' products. They are usually the most successful.
- b) Introducing the software at school and university labs, a long range but most effective marketing investment.

Software translation into Spanish is crucial to access a massive market. Otherwise, sales necessarily concentrate on highly educated and/or specialized clients. Software translation will also open up the possibility of using Argentina as a jumping board to other Spanish-speaking markets, particularly within Mercosur, the newly formed common market by Argentina, Brasil, Paraguay and Uruguay. Experts in the field report that other Mercosur partners' software markets are at a lower technological stage than that prevailing in Argentina.

When dealing with government contracts it is much better to try to divide contracts into a large number of separate, smaller contracts. This is a very important strategy to avoid IBM lobbying activity against what they would view as a competitor. IBM usually involves itself in countering other large proposals to the government, but has shown itself to be uninterested in countering contracts for smaller amounts. Thoroughly reviewing this market quirk with the government officer involved in negotiations, particularly so if he is new in his position, is a most advisable path.

Firms that are trying to appeal to a large client base, report that one way of doing it is working as 'integrators', that is, selling a combination of hardware and different kinds of software that will give the client a global solution in terms of systems requirements. This type of approach will probably be successful for the next three years, the time thought to be required by all big and middle sized firms to computerize their environment. On the other hand, specializing in too

narrow a field (i.e.: concentrating in one product) can carry very slim profit margins because of competition from the USA grey market.

Software products aimed at a specific industry are limited in their growth potential. Continued success, therefore, will be linked to the ability of the software company to provide the market with successive new products, or constant upgrades.

Argentine firms resent being forced to pay licenses for PC software that they came by during the 1980s when they feel they had no other alternative to piracy. When faced by litigation the firms usually reach an out-of-court settlement to pay the license, but they immediately switch to a competing software, buying its license.

Argentine business office culture, especially in government, is rather anarchic. Users favour software that allows for individual files and individual usage. Integrated software solutions are resisted.

## VI. Argentine View of Foreign Associate Firms

The main problems with working with foreign firms, as reported by the participants of this survey were:

1. The foreign firms know little about South America and its market, making it difficult to explain the peculiarities needed to expand business in Argentina. Firms from the United States, in many instances, further complicate things by hiring a Mexican American or Cuban American as their Latin American expert and Project Manager. USA businessmen do not seem to be aware that in spite of the common language, Latin America is made up of very different cultures, stemming from the varying mixtures of indigenous races, immigration waves from Europe and Asia, and the impact of differing geographical features that comprise each country. In past experience, the so-called expertise has lead to many subsequent misunderstandings, and to inadequate marketing support.

2. Argentine government import regulations (many of which have recently been abolished) have usually been considered irksome by the foreign firm, and discouraged some of the business

prospects developed.

3. Because of computers and software being so new to Argentina, the startup cost for penetration of the market is higher than in the more mature northern markets due to the need of educating the consumer. As few of the foreign firms initially consider this cost, it causes budget problems when it finally comes up in later marketing discussions.

4. It takes a long time for a local Argentine company to establish credibility with a foreign firm, partially because of the many stories of bad experiences of foreign firms trying to operate in Latin America, coupled with cultural differences. Because of the cultural differences, it is difficult for foreign firms to determine which Argentine firms would make good business partners. This factor makes the northern partners uncomfortable about sending master copies to Argentine firms to have the copies made here. They prefer to keep control, and to send only the quantity of packages ordered by the end users. The resultant customs tariffs and procedures add 55.6% to FOB costs.

5. In general, software firms in Argentina are small, producing way below 2% of the overall sales of some of the major software firms in the USA. The Argentine market is therefore not very important to the USA partner company. The USA companies are thus not willing to dedicate many resources to developing market share. Additionally, Argentines seem to be dealing in general with software developers and corporations with a strong product oriented philosophy, therefore not very prone to understanding marketing requirements in the local market.

## VII. Legal Framework

### a) Customs Proceedings

In 1989 the newly elected Government began its historic economic policy of import deregulation. Ever since then the trade situation has been in a state of flux. Trade restrictions have been

dramatically reduced during the last few months and further changes wouldn't be surprising. For the time being, total import costs, excluding VAT and VAT Surplus, amount to approximately 25 % of FOB price.

These costs include not only taxes but also shipping, insurance and handling at the port of entry (which in turn includes financial costs because of the merchandise being paid for, but not available for selling due to the importing process). In November 1991 customs procedures, which in the past

have added time, considerable effort, and therefore cost to imports, underwent an overhaul (Deregulation Decree, Foreign Trade Chapter, 11/91). It is now possible to make a declaration, under oath, as to the contents and value of the shipment at the time of arrival, when the goods are being downloaded from the ship. The importer then pays the total tax cost on the declared value, and is able to take possession of the goods at that time. If there are discrepancies between the import price claimed by the importer and the price on which Customs claims the goods should be valued to base the tax payment, the importer can pay the amount claimed and initiate a summary protestation case. The procedure for initiating the case takes less than 30 minutes and involves filling a form and depositing a guarantee fund of the amount that Customs is claiming the goods are worth. The case is resolved in 30 to 60 days, at which time any excess money deposited is refunded.

As shown in the adjacent table, total import taxes amount to 16% of FOB price. These taxes are not refunded at any time by the government. They become a part of costs, and as was explained in a previous section, they can be avoided by arranging for

-Software Imports- Non-Tax Import Costs	
Type	Rate
Air Shipping	2% to 3%
Insurance	1%
Handling at Port of Entry	approx. 6%
Source: Novadata	

-Software Imports- Import Taxes due at Port of Entry	
Type of Tax	Tax Rate
Tariff	13%
Statistics	3%
Total Import Taxes	16%
Source: Novadata	



copying of the master diskettes of software programs, directly in Argentina.

Other taxes due at the port of entry amount to 24% of FOB price plus other items (listed below). Value Added Tax is paid on all goods whether local or not. In case of imports it is due at the port of entry. Unlike other goods, imported goods also pay a VAT surplus due upon entry. Both taxes are refunded by the government (ie. they generate a fiscal credit) when selling the goods.

-Software Imports- Other Taxes due at Port of Entry	
Type of Tax	Tax Rate
VAT	18%
VAT Surplus	6%
Source: Novadata	

The total tax structure on software imports, effective as of January 1992, is shown again in the next table. This time attention is called upon the varying criteria the Argentine government uses to calculate the taxable base in order to compute the different taxes. Taking into account the tax base used, total import taxes plus shipping and insurance, amount to 20.6% of FOB price. Handling costs add an additional 6%.

So 26.6% of FOB price becomes a fixed import cost, avoidable only by allowing the Argentine partner or agent to copy the master diskettes in Argentina, as was pointed out earlier. The financial burden at port of entry is increased by VAT and VAT surplus total to 55.6%.

#### b) Copyright Protection Laws:

Software ownership in Argentina is protected by Copyright Law 11723. The law was originally made to protect rights of artists and writers, so the fiscal treatment of any property registered under it is very benevolent. Income tax

on intellectual goods is 12% annually. The protection is valid during the author's lifetime and 50 years thereafter, in case there are inheritors. Penalties for violating the copyright law are the same as under article 172 of the Fraud Chapter of the Penal Code and include severe economic sanctions to cover damage and jail sentences ranging from a few months to several years. Law 11723 has some inadequacies when it comes to software protection. One of its articles, for example, outlaws any changes to the product, which means that programming under Lotus or Fox, as an example, would be illegal. There is a proposed law in Congress that will change some of the restrictions of the traditional copyright law.

The software industry in Argentina takes substantial measures to curb piracy. Interviewed firms report that vigilance and actions taken should be sustained consistently in order to get results. When efforts are relinquished, piracy returns. Some of the steps taken are:

i) an annual workshop on software property rights that attracts substantial press coverage. This workshop provides an opportunity to exchange ideas on procedures to protect software and deal with piracy, as well as lobbying the government for Court and police help and Congressional cooperation.

ii) Argentine firms have hired lawyers with the purpose of having them specialize in software copyright protection. These lawyers investigate large corporations in order to discover violations of copyright laws. When evidence is established they litigate with the goal of reaching an out-of-court settlement that includes both the paying of a license to use the software as well as the paying of newspaper ads defending software property rights as compensation for damages. Court cases of this kind can take several years (which means large expenditures in legal fees) and often end up in jail sentences plus the paying of the software licence. There is, then, an incentive by both parties to reach out-of-court settlements. Large and medium sized firms targeted are themselves holders of licences, trademarks and patents from foreign corporations that they need to protect. As such, they are often more concerned with their public image in these cases than with the costs of a settlement package.

Even so, the most successful course of action, particularly for foreign software firms planning to operate in the Argentine market, is to restrict litigation to firms that have been dedicated to selling pirated copies.

-Software Imports- Tax Base used at Port of Entry	
Type of Tax	Tax Base
Tariff	FOB + Shipp. + Insur.
Statistics	FOB + Shipp. + Insur.
VAT	FOB + Shipp. + Insur. + Import Taxes
VAT Surplus	FOB + Shipp. + Insur. + Import Taxes
Source: Novadata	

As to firms that use pirated copies, the recommended course of action is to ensure that the sales force visits them and explains the advantages of legal ownership, namely free technical support and inexpensive periodic upgrades. It is also advisable that software representatives be willing to overlook the fact that a company may not have legal ownership of their software, but still provide them with some technical support. This will help them become aware of what they would gain with legal ownership. Suing them or threatening them with litigation has prompted them to pay for the license once and then adopt a competitor's software.

In order for Argentine firms to further appreciate the advantages of legal ownership, software firms operating in the Argentine market will have to at least approximate market prices of software in the USA. This means that the software firms would have to work with very slim mark ups. Legitimate software packages have traditionally sold for three times the USA price. This is due in part to the fact that firms in Argentina representing software houses are seldom licensed to reproduce master copies and are forced to add considerable customs and shipping costs by importing each package they sell and by traditional ways of providing technical support, that make it a very costly service.

### VIII. A Final Comment

Opportunities in the Argentine software market have up to now generated in the full fledged opening of the economy to imports, in April 1991. The ensuing explosive demand for software products is expected to last until 1995. The privatization program of late 1990 has opened large sectors of the economy to investment, both local and international, which is expected to generate additional software demand as from 1992. Similar expectations stem from the deregulation program started in November 1991 which will be expanded during 1992. Rates of growth of software demand are expected to average 40% during 1992 and further increase in the following years. The local market is still small compared to Canada, but given continued stability it is expected to become increasingly important. Entering the market may be in some cases rather involved because of cultural differences, but should prove worthwhile in the medium run.

An important point to consider when looking at Argentina as a potential market, is the fact that because of the newly formed common market (Mercosur), between Argentina, Brasil,

Paraguay and Uruguay, Argentina can now be regarded as a door to the entire Latin America software market. Mercosur partners, especially Brasil, have been reported to be at more backward levels of technical development in software and expected to undergo explosive demand growth of Argentine software because of the opening of its market. This would add volume to the Argentine market and help reduce its prices. Other non-Mercosur countries such as Spain, Mexico and Chile, which grant "most favoured nation treatment" to Argentina and its partners, are also considered to be at lower development stages in software technology, therefore apt to take advantage of the newly created economies of scale. Young Argentine software entrepreneurs talk excitedly about a 250 million consumer market awaiting for software in Spanish and Portuguese.

Also it is quite possible that because of numerous parallels between Canada and Argentina. in population numbers, prevalent education levels and resource based industries (oil, gas, agriculture, fishing and mining), Argentina's recent return to a free market economic model will yield a software demand structure similar to that of Canada. Because of these parallels, Canadians may be in a better position to foresee the development of possible market niches for the next five years, based on their home market experience, more successfully than even local software firms can. Economic theory teaches us that with a free market economic type of organization, two countries with similar basic initial conditions (population numbers, education levels, land extension and types of natural resources) render a similar price structure, which in turn should determine similar market niches and opportunities. Economic history shows that there is a time path for the price structure to accommodate after the type of transformations Argentina has undertaken in the last two years. It places the time frame between five to seven years. This means that, generally speaking, any niche that a Canadian firm is today exploiting in its home market could very well appear in Argentina within the next five years. ♣

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## Appendixes



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**A**

**Government Departments Relevant  
to the Argentine Software Industry**



## GOVERNMENT DEPARTMENTS RELEVANT TO THE ARGENTINE SOFTWARE INDUSTRY

### I) Federal Government

#### a) Subsecretaría de Informática y Desarrollo

**Contact:** Ing. Alberto Sassali

**Address:** Av. Córdoba 831 -Piso 5

**Postal Code:** 1054 Buenos Aires

**PH#:** 312-4142/313-1749

**Fax#:** 311-7890

Establishes the software systems policy as to R & D funds for education and government sponsored software development by local industry as well as marketing support.

#### Dirección de Enlaces Institucionales

**Contact:** Ing. Valentino Kunica

**Address:** Córdoba 831 -Piso 3

**Postal Code:** 1054 Buenos Aires

**PH#:** 312-8917

**Fax#:** 311-7890

#### Dirección Nacional de Desarrollo Informático

**Contact:** Ing. Rolando Boldt

**Address:** Córdoba 831 -Piso 3

**Postal Code:** 1054 Buenos Aires

**PH#:** 311-2072

**Fax#:** 311-7890

#### Dirección de Desarrollo Informático

**Contact:** Comp. científica: Silvia Tejero

**Address:** Córdoba 831 -Piso 3

**Postal Code:** 1054 Buenos Aires

**PH#:** 311-4142

**Fax#:** 311-7890

Studies of software development by industrial sector; promotion of technical innovation.

#### Dirección Nacional de Política Informática

**Contact:** Lic. Jorge Plano

**Address:** Córdoba 831 -Piso 3

**Postal Code:** 1054 Buenos Aires

**PH#:** 313-9153

**Fax#:** 311-7890

Assists in the establishment of policies.

#### b) Secretaría de la Función Pública

##### Subsecretaría de Sistemas de Información

**Contact:** Ing. Juan Franchino

**Address:** Av. Pte. Roque Saénz Peña 801 -Piso 8

**Postal Code:** 1035 Buenos Aires

**PH#:** 343-7458

Establishes acquisitions of software and hardware policies for the Federal Government as a whole, up to and including ministries, departments and agencies.

**II) Municipality****Subsecretaría de Sistemas de Información****Contact:** Francisco Figueira**Address:** Independencia 635 -Piso 6**Postal Code:** 1099 Buenos Aires**PH#:** 361-8693

Sets guidelines for hardware and software purchases, computer education funds & software development programs.

**Dirección General de Procesos Informáticos****Contact:** Enrique Medina**Address:** Independencia 635 -Piso 6**Postal Code:** 1099 Buenos Aires**PH#:** 361-8693

Assists in setting guidelines.

**Dirección Gral. de Investigación, Desarrollo y Capacitación****Contact:** Rubén Fernandez Iriart**Address:** Independencia 635 -Piso 6**Postal Code:** 1099 Buenos Aires**PH#:** 361-8693

Assists in setting guidelines.



### III) Special Programs

**Programa Nacional de Información y Comunicación Científica y Tecnológica (PNICCYT)**

Contact: Comp. Científica Estela Barone

Address: Av. Córdoba 831 -Piso 5

Postal Code: 1054 Buenos Aires

PH#: 312-8917

Main Themes: Provides R&D funds; has set up and now manages a computer network that links Argentine research centers with the USA; supports with information & political assistance a network of Argentine scientists that specialize in computers and software.

**Programa Nacional de Apoyo y Difusión Informática (PNADI)**

Contact: Ing. Hugo Padovani

Address: Av. Córdoba 831 -Piso 5

Postal Code: 1054 Buenos Aires

PH#: 313-8389

Main Themes: Provides funds for training and development of human resources at the graduate level.

**Programa Argentino Brasileiro de Informática (PABI)**

Contact: Ing. Hugo Padovani

Address: Av. Córdoba 831 -Piso 5

Postal Code: 1054 Buenos Aires

PH#: 313-8389

Main Themes: Provides funds for training; for binational computer systems labs and binational graduate schools meetings and course teaching.

**Programa Nacional de Informática y Electrónica (PNIE)**

Contact: Ing. Ernesto Peraud

Address: Av. Córdoba 831 -Piso 5

Postal Code: 1054 Buenos Aires

PH#: 312-8917

Main Themes: R&D funds for microelectronic development projects.

**IV) International Organizations****United Nations****Programa Regional de Cooperación en Informática y Microelectrónica****Contact: Carlos Correa****Address: Pueyrredón 524 -Piso 3****Postal Code: 1032 Buenos Aires****PH#: 961-2247****Fax#: 111-1516****Tx#: 24826 AR**

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**B**

**Trade Shows and Events**



## SOFTWARE TRADE SHOWS & EVENTS

Some of the trade shows listed here are special events held only once. Some others took place for the first time in 1991 and may become periodic in the future. Others, where indicated, are established regular events. It is advisable to get in touch with CESSI for detailed information, dates, etc.. <sup>(1)</sup>

\* "Foro de la Dirigencia Empresaria"

Date: July 23-30,91

\* "Primer Encuentro Panamericano Parlamentario sobre Derechos Intelectuales en la Obra de Software"

Date: June 25-26-27, 91

\* "Seminario sobre: T.Q.C. Técnicas de Control de Calidad y Técnicas Gerenciales en Empresas Hoy"

Date: October 25, 91

\* "Primer Congreso Regional de Informática en Sistemas Abiertos"

Date: October 24-25-26, 91

\* "Foro I de la Informática"

Date: October 3-6, 91

\* "Congreso Iberoamericano de Informática Educativa"

Date: October 17-19, 91

\* "Udes '91"

Date: September 23-27, 91

\* "Usuaría"

Date: June, 91

\* "Software '9?"

Date: September each year

\* "VI Jornada de Reflexión de la Comunidad Informática"

Date: July 10, 91

\* "Escuela de Informática Brasileiro-Argentina"

Date: January, biannually

\* "Encuentro Brasileiro-Argentino de Investigadores de Informática"

Date: January, biannually

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Notes: (1) - CESSI's data is found in the Associations' List appendix C



**Industry Associations that Accept Software Firms**





## INDUSTRY ASSOCIATIONS THAT ACCEPT SOFTWARE FIRMS

- **CAC**            **Cámara Argentina de Comercio**  
 President: Sr. Carlos R. de la Vega  
 Address: Av. Leandro N. Alem 36  
 Postal Code: 1003 Buenos Aires  
 Phone: 331-8051/5 334-9423 30-7783 34-6371  
 Fax:331-8055
  
- **CADAS**        **Cámara Argentina de Desarrollos y Aplicaciones Satelitales**  
 President: Sr. Eduardo Eurnekian  
 Address: Paraguay 1855  
 Postal Code: 1121 Buenos Aires  
 Phone: 42-2673/3280/0460 814-2648/50  
 Fax: 814-2650
  
- **CADIE**         **Cámara Argentina de Industrias Electrónicas**  
 President: Sr. Osvaldo Targón  
 Address: Bernardo de Irigoyen 330 - Piso 5  
 Postal Code: 1072 Buenos Aires  
 Phone: 334-4708/4159/5752/6672/7763  
 Fax:334-6672
  
- **CAEMA**         **Cámara Argentina de Equipos y Máquinas de Oficinas**  
 President: Sr. Angel Caggioli  
 Address: Hipólito Yrigoyen 850 - Piso 2 - Of. 205  
 Postal Code: 1377 Buenos Aires  
 Phone: 343-3842 (de 13 a 18 hs)  
 Fax:343-8045
  
- **CAFEMO**        **Cámara Argentina de Fabricantes de Equipos y Máquinas de Oficinas**  
 President: Dr. Luis Huidobro  
 Address: Alsina 1607 - Piso 1  
 Postal Code: 1088 Buenos Aires  
 Phone: 40-5063/5571/6840/4967  
 Fax:814-4407
  
- **CAME**           **Coordinadora de Actividades Mercantiles Empresarias**  
 President: Sr. Osvaldo J. Cornide  
 Address: Florida 1 - Piso 6  
 Postal Code: 1005 Buenos Aires  
 Phone: 343-1739/4345/4399/9744 342-7870 int 168  
 Fax:342-1529
  
- **CAMOCA**        **Cámara Argentina de Máquinas de Oficinas Comerciales y Afines**  
 President: Sr. Ricardo José Rojo  
 Address: Av. Córdoba 950 - Piso 9  
 Postal Code: 1054 Buenos Aires  
 Phone: 393-5762/7026  
 Fax: N.A.

- **CATYA**      **Cámara Argentina de Phone y Afines**  
President: Sr. Armando Anore  
Address: Av. Paseo Colón 588 - Piso 5 - Of. 14  
Postal Code: 1063 Buenos Aires  
Phone: 30-8853/7956  
Fax:343-7956
  
- **CCI**      **Cámara de Comercio Internacional**  
President: Dr. Alejandro Shaw  
Secretario: Dr. Herberto Hugo Karplus  
Address: Comité Arg.: Av. Leandro N. Alem 36  
Postal Code: 1003 Buenos Aires  
Phone: 331-8051/55  
Fax:331-8055
  
- **CESSI**      **Cámara de Empresas de Software y Servicios Informáticos**  
President: Lic. José Luis Ferreyro  
Address: Tucumán 1427- Piso 6  
Postal Code: 1050 Buenos Aires  
Phone: 45-1321; 45-1329; 46-7124  
Fax: N.A.
  
- **CICOM**      **Cámara de Informática y Comunicaciones**  
President: Sr. Carlos Killian  
Secretario: Sr. Alfredo Bellotti  
Address: Av. Córdoba 744 - Piso 2 - Of. "D"  
Postal Code: 1054 Buenos Aires  
Phone: 393-7352 325-8839  
Fax: 325-9604
  
- **CICOMRA**      **Cámara de Informática y Comunicaciones de la Rep. Arg.**  
President: Sr. Carlos Killian  
Address: Av. Córdoba 744 - Piso 2 - Of. "D"  
Postal Code: 1054 Buenos Aires  
Phone: 393-7352 325-8839  
Fax:325-9604
  
- **CIR**      **Cámara Informática del Sur**  
Contacto: Ing. José Luis Tolosa - Oficina: 091-25299  
Address: Alsina 19 - Piso 2 - Bahía Blanca  
Postal Code: 8000 Pcia. de Buenos Aires.  
Phone: 091-38416/513574 -  
Telefax: 091-34434  
Fax: 091-517161
  
- **CPCI**      **Consejo Profesional en Ciencias Informáticas**  
President: Lic. Pablo Asensio  
Address: Av. Callao 66 - Piso 6  
Postal Code: 1022 Buenos Aires  
Phone: 951-7161/9548 952-8352

- COPIET

**Consejo Profesional de Ingeniería Electrónica y  
Telecomunicaciones**

**Address: Perú 562**

**Postal Code: 1068 Buenos Aires**

**Phone: 30-8407/8423 34-7289**

**Fax:343-8423**



## SOFTWARE RELATED TRADE ASSOCIATIONS

- **AADS**  
 President: Sr. Eduardo L. Guarnieri - 93-5011  
 Address: Uruguay 743 - Piso 3  
 Postal Code: 1015 Buenos Aires  
 Phone: 45-1032/0062
  
- **AESSIT**  
**Asociación de Exportadores de Software, Servicios Informáticos y Teleinformáticos**  
 President: Sr. Agustín Molinari  
 Address: Av. Pueyrredón 1770 - Piso 3  
 Postal Code: 1119 Buenos Aires  
 Phone: 826-5778/9396 - Sr. Molinari 313-3402  
 Fax: 962-4502
  
- **AFARTE**  
**Asociación de Fábricas Argentinas Terminales de Electrónica**  
 President: Sr. Manuel Jurkowski  
 Address: Av. Leandro N. Alem 690 - Piso 10  
 Postal Code: 1001 Buenos Aires  
 Phone: 312-8850  
 Fax: 313-2552
  
- **AIERA**  
**Asociación de Importadores y Exportadores de la República Argentina**  
 President: Lic. Fernando A. Raimondo  
 Address: Av. Belgrano 124 - Piso 1  
 Postal Code: 1092 Buenos Aires  
 Phone: 342-0010/0018/0019  
 Telex: 25761  
 Telefax: 342-1312
  
- **APYMIE**  
**Asociación de Pequeñas y Medianas Industrias Electrónicas**  
 President: Dr. Mario Elkouss  
 Address: Gascón 62  
 Postal Code: 1181 Buenos Aires  
 Phone: 981-2335
  
- **ASAMYR**  
**Asociación Argentina para el Procesamiento y Administración de la Informática**  
 Contact: Sr. Osvaldo Quintana  
 Address: Sarmiento 1967 - Of. 8  
 Postal Code: 1044 Buenos Aires  
 Phone: 953-2063
  
- **CALAI**  
**Conferencia de Autoridades Latinoamericanas de Informática**  
 Secretario Permanente: Dr. Carlos M. Correa  
 Address: Tucumán 255 - Piso 9 - Of. "C"  
 Postal Code: 1049 Buenos Aires  
 Phone: 312-1824
  
- **CAS**  
**Cámara de Software**  
 President: Sr. Cometta Mazoni  
 Address: Tucumán 1427 -Piso 6  
 Postal Code: 1050 Buenos Aires  
 Phone: 46-1779/1076/7124

- CPIET**      **Consejo Profesional de Ingeniería Electrónica y Telecomunicaciones**  
Address: Perú 562  
Postal Code: 1068 Buenos Aires  
Phone: 343-8407/8423 342/7289  
Fax: 343-8423
  
- FLAI**      **Federación Latinoamericana de Informática**  
President: Sr. Castro Leachtaler - 311-2903  
Address: Rincón 326  
Postal Code: 1081 Buenos Aires  
Phone: 47-2855/2631
  
- IEEE**      **Instituto de Ingenieros en Electricidad y Electrónica**  
President: Ing. Raúl O. Sabio  
Address: Defensa 320 - Piso 3  
Postal Code: 1065 Buenos Aires  
Phone: 331-5629 334-7139  
Telefax: 331-8331  
Fax: 343-8423
  
- INTI**      **Instituto Nacional de Tecnología Industrial**  
Contacto: Ing. Enrique Mario Martinez  
Address: Av. Leandro N. Alem 1067 - Piso 5, 6 y 7  
Postal Code: 1001 Buenos Aires  
Phone: 313-3013/3054/3092/3792  
Fax: 313-2130
  
- PNUD**      **Programa Regional de Cooperación en Informática y Microelectrónica**  
Contacto: Sr. Carlos Correa  
Address: Esmeralda 130 - Piso 13  
Postal Code: 1035 Buenos Aires  
Phone: 961-2247/8176
  
- SADIO**      **Sociedad Argentina de Informática e Investigación Operativa**  
President: Lic. Alejandro Oliveros  
Address: Uruguay 252 - Piso 2 - Of. "D"  
Postal Code: 1015 Buenos Aires  
Phone: 45-3950 40-5755 (de 15 a 20 hs.)
  
- SEI**      **Servicios Especiales en Informática**  
Director: Sr. Aldo Rubén Paladini  
Address: Fray Luis Beltrán 107 (alt. Rivadavia 6400)  
Postal Code: 1406 Buenos Aires  
Phone: 631-1354/1359  
Radiomessage: 46-4001 45-4081/4091 Code: 61154 -  
Code: SEI  
Fax: 631-1354
  
- UDES**      **Unión Argentina de Entidades de Servicios**  
President: Dr. Rodolfo Martinez  
Address: Viamonte 352 - Piso 2  
Postal Code: 1053 Buenos Aires  
Phone: 312-4771/0928  
Fax: 312-4771/0928

**- UIA****Unión Industrial Argentina****President: Sr. Israel Mahler****Address: Av. Leandro N. Alem 1067 - Piso 11****Postal Code: 1002 Buenos Aires****Phone: 311-8429/9399****Fax: 313-2413****- USUARIA****Asociación Arg. de Usuarios de la Informática y las Comunicaciones****President: Sr. Julio Minuzzi - 311-3140****Secretary: Dr. Chervatin - 312-5941/6442/4337****Address: Rincón 326****Postal Code: 1081 Buenos Aires****Phone: 951-2855/2631**





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**D**

**Member Firms of CESSI,  
the Main Argentine Software Trade Association**



**MEMBER FIRMS OF CESSI,  
THE MAIN ARGENTINE SOFTWARE TRADE ASSOCIATION**

**- ADATA S.R.L.**

Represented by: Lic. Andres Muchinik  
 Address: Av. Corrientes 821 - Piso 6  
 Postal Code: 1043 - Buenos Aires  
 Phone: 394-5005-5195  
 Type of hardware they focus on: PC, Mini,  
 Mainframe  
 Operating system they focus on: DOS, UNIX,  
 others.  
 Products: Base software; programming language,  
 office automation, relational data base,  
 Application software.  
 Services: Representation and distribution.

**- AGI S.A.**

Represented by: Ing. Luis Aguilar  
 Address: Uruguay 265 - Piso 9 - Of. "A"  
 Postal Code: 1015 - Buenos Aires  
 Phone: 49-6274/70  
 Type of hardware they focus on: PC, Mini,  
 Mainframe.  
 Operating system they focus on: DOS, UNIX,  
 others.  
 Products: Base software; Application  
 software; Keysoft and Complikit.  
 Vertical markets they focus on: Retail, bank credits.

**- AMERICAN SECURITY INT. S.A.**

Represented by: Sr. Gustavo Weidemann  
 Address: Esmeralda 672 - Piso 3  
 Postal Code: 1007 - Buenos Aires  
 Phone: 322-2713/2513/2233  
 Type of hardware they focus on: PC, Multimedia.  
 Products: Multimedia, reproduction and packaging  
 for the Latin American market on behalf of software  
 houses in the USA, the full line of Harvard Graphics,  
 Open Access, DR-DOS.  
 Services: Multimedia, software translation, technical  
 support for the full line of: Harvard Graphics,  
 Open Access, DR-DOS.

**- ANTECH S.R.L.**

Represented by: Sr. Herminio Antelo  
 Address: Zapiola 620 - Piso 4 - Of. "D"  
 Postal Code: 1426 - Buenos Aires  
 Phone: 551-3819  
 Type of hardware they focus on: PC, Mini,  
 Mainframe.  
 Operating system they focus on: DOS, UNIX  
 Products: Base software, Application software,  
 Health system, Union's system.  
 Vertical market focus on: Union's, hospitals belonging to worker's union's system.

**- ARTHANCO S.A.**

Represented by: Sr. Stadler/ Srta. Alejandra  
Address: Santa Fe 2873  
Postal Code: 1640 - Martinez  
Phone: 792-3463/3527

**- ASICOMP S.R.L.**

Represented by: Dr. Jorge Buchter  
Address: Av. Velez Sarsfield 5575/79  
Postal Code: 1605 - Munro  
Phone: 762-2279  
Type of hardware they focus on: PC, Mainframe,  
others.  
Operating system they focus on: DOS, UNIX.  
Products: Base software, application software.  
Services: Programming analysis, equipment.  
Vertical markets they focus on: Government, medicine,  
municipalities, metalurgy, autoparts.

**- AXOFT ARGENTINA S.A.**

Represented by: Sr. Pablo F. Gelbstein  
Address: Cerrito 1216 - Piso 10  
Postal Code: 1010 - Buenos Aires  
Phone: 394-1350/2427

**- BAIRE A.P. S.A.**

Represented by: Sr. Alejandro Diaz  
Address: Juncal 754 - Piso 1 - Of. 11  
Postal Code: 1062 - Buenos Aires  
Phone: 311-5527 312-6521  
Type of hardware they focus on: PC, Mini.  
Operating system they focus on: DOS, UNIX,  
others.  
Products: Base software, application software  
on medicine, medical coverage belonging to workers  
and unions.  
Vertical markets they focus on: clerical, medical  
coverage belonging to workers, unions.

**- BAIWO S.A.**

Represented by: R. Miguel Telecemian  
Address: Av. Rivadavia 1367 - Piso 14  
Postal Code: 1033 - Buenos Aires  
Phone: 38-0396/8298

**- BELGRANO SOFTWARE**

Represented by: Sr. Isidoro Rosenblat  
Address: Belgrano 240 - Piso 3  
Postal Code: 1650 - San Martin  
Phone: 755-9996

**- BERNASCONI Y CARDEY COMP. S.R.L.**

Represented by: Sr. Lucio Bernasconi  
Address: Av. Pueyrredon 538 - Piso 5 - Of. "A"  
Postal Code: 1032 - Buenos Aires  
Phone: 961-2472/2182

- BINARIA S.A.

Represented by: Ar. Armando Carreto  
Address: Viamonte 610 - Piso 5  
Postal Code: 1053 - Buenos Aires  
Phone: 322-4100/4200

- BLANDUR S.A.

Represented by: Ing. Carlos Huergo  
Address: Esmeralda 1037  
Postal Code: 1007 -Buenos Aires  
Phone: 312-5723/5029

- BUENOS AIRES SOFTWARE S.R.L.

Represented by: Sr. Juan Ruggero  
Address: Salta 324 - Piso 1  
Postal Code: 1074 - Buenos Aires  
Phone: 38-5977/1089  
Type of hardware they focus on: PC  
Operating system they focus on: DOS, UNIX, others.  
Products: Base software, application software, accounting.  
Services: Training, maintenance.  
Vertical markets they focus on: Schools.

- BUFFA SISTEMAS S.R.L.

Represented by: Lic. Hector L. Buffa  
Address: Hip. Yrigoyen 434 - Piso 5 - Of. 11  
Postal Code: 1086 -Buenos Aires  
Phone: 34-9264/6288

- BULL ARGENTINA S.A.C.I.

Represented by: Lic. Juan Carlos Aranda  
Address: Carlos Pellegrini 1363  
Postal Code: 1011 - Buenos Aires  
Phone: 325-2016 394-5134

- BUROTTO Y ASOCIADOS S.R.L.

Represented by: Sr. Jorge M. Burotto  
Address: Sarmiento 1469 - Piso 4  
Postal Code: 1042 - Buenos Aires  
Phone: 49-1237/1392

- C.P.G. SISTEMAS GENERALES S.A.

Represented by: Sr. Jorge L. Mendivelzua  
Address: Tte. Gral. Peron 949 - Piso 7  
Postal Code: 1038 - Buenos Aires  
Phone: 35-4141/3841/3904/3509

- C.R. FUKS Y ASOCIADOS

Represented by: Cont. Clara Fuks  
Address: Av. Callao 420 - Piso 10 - Of. "D"  
Postal Code: 1022 - Buenos Aires  
Phone: 40-0373

- CAPSI S.R.L.

Represented by: Ing. Roberto Vigil  
Address: Viamonte 773 - Piso 1 - Of. "B"  
Postal Code: 1053 - Buenos Aires  
Phone: 322-3313/3383  
Type of hardware they focus on: PC  
Products: Dbase and other packaged software, peripherals and computer supplies.  
Services: Technical support.

- CARTELCO S.A.

Represented by: Ing. Jorge P. Lamas Louge  
Address: Av. Corrientes 1145 - Piso 12  
Postal Code: 1043 - Buenos Aires  
Phone: 35-0543/0541  
Type of hardware they focus on: Minis: AS/400,RS/600.  
Products: Software development.  
Services: Consultants in hardware and software,  
integrated management system and technical support.

- CENTRO DE EDUCACION INFORMATICA

Represented by: Ing. Alfredo D'Alessio  
Address: Av. Pueyrredon 860 - Piso 9  
Postal Code: 1032 - Buenos Aires  
Phone: 962-4689 961-6430

- COLINET, TROTTA S.R.L.

Represented by: Sr. Miguel Fontanella  
Address: España 37  
Postal Code: 2000 - Rosario  
Phone: (041) 246181

- COMPUBECCAR S.A.

Represented by: Sr. Jorge Ramazzini  
Address: Av. Centenario 2031  
Postal Code: 1643 - Beccar  
Phone: 743-1390/1215

- COMPUTACION B.K.O. S.A.

Represented by: Sr. Nestor H. Deva  
Address: San Martín 910 - Piso 1  
Postal Code: 1004 - Buenos Aires  
Phone: 312-1971/1973

- COMPUTACION CEICOM S.A.

Represented by: Sr. Rodolfo Marchioni  
Address: Moreno 970 - Piso 1  
Postal Code: 1091 - Buenos Aires  
Phone: 334-4486/89

- COMPUTACION TACUARI S.A.

Represented by: Sr. Tomas Rendelstein  
Address: Tacuari 351 - Piso 1  
Postal Code: 1071 - Buenos Aires  
Phone: 34-0332

- COMPUTEC SISTEMAS S.R.L.

Represented by: Sr. Carlos Pallotti  
 Address: Av. Corrientes 4609  
 Postal Code: 1195 - Buenos Aires  
 Phone: 88-7093

- CONORPE S.A.

Represented by: Dr. Felipe Yannaduoni  
 Address: Av. Córdoba 836 - Piso 7  
 Postal Code: 1054 - Buenos Aires  
 Phone: 325-6761/6763  
 Type of hardware they focus on: Mainframe & PC  
 Products: software and hardware, bilingual publicity products.  
 Services: Consulting, software development and PC packages for management.

- CONSAD S.A.

Represented by: Lic. Marcelo Cattaneo  
 Address: Av. Córdoba 836 - Piso 13  
 Postal Code: 1054 - Buenos Aires  
 Phone: 393-3336/3384

-CONSIST TELEINF S.A.

Represented by: Sr. Ruben Dario Schilliro  
 Address: Av. Corrientes 345 - Piso A  
 Postal Code: 1405- Buenos Aires  
 Phone: 313-1747  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software; Predict com-plete, Application software.  
 Services: consulting, training, development of special projects, technical support, banking, education, health, transportation, social security.  
 Vertical markets they focus on: municipal government, provincial government, aeronautics, shipping industry, communications, home appliances/ lighting, chemistry, tobacco industry, steel

- CONSULTORA M.W. Y ASOC.

Represented by: Dr. Manuel Wiaggio  
 Address: Av. Acoyte 532 - Piso 4 - Of. "A"  
 Postal Code: 1405 - Buenos Aires  
 Phone:901-2126

- DATA S.A.

Represented by: Lic. Heriberto Scala  
 Address: Av. Belgrano 990 - Piso 1  
 Postal Code: 1092 - Buenos Aires  
 Phone: 334-3426/6245  
 Type of hardware they focus on: PC, Mainframe.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software ( CABSE, KNOSYS, CLARITY), application software (DATALEX), accounting.  
 Services: Law firms.  
 Vertical markets they focus on: system development, storage of documents and images, clerical.

- DATAFOX INFORMATICA S.A.

Represented by: Lic. Jorge Kaloustian  
 Address: Tacuari 427 - Piso 1  
 Postal Code: 1071 - Buenos Aires  
 Phone: 334-4238  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software; Application software,  
 Services: Computer Center installations, training.  
 Vertical markets they focus on: Medicine,  
 law, hotel management, artificial  
 intelligence, library and restaurant  
 management.

- DATASYSTEM S.A.

Represented by: Sr. Rodolfo Murrone  
 Address: Reconquista 661 - Piso 4  
 Postal Code: 1003 - Buenos Aires  
 Phone: 313-4050/5371/4035

- DATATECH S.A.

Represented by: Dr. Elias Tauscher  
 Address: Av. Córdoba 1184 - Piso 3 - Of. "A"  
 Postal Code: 1055 - Buenos Aires  
 Phone: 40-1616/46 46-1971

- DESARROLLO DE SISTEMAS

Represented by: Sr. Bernardo Eppel  
 Address: Estados Unidos 1550  
 Postal Code: 1101 - Buenos Aires  
 Phone: 23-4154/5014  
 Type of hardware they focus on: PC, Mini.  
 Operating system they focus on: others (Xenix)  
 Products: Base software, application software on development and maintenance of  
 systems.  
 Services: Developments in Unix, maintenance,  
 development of tailored systems.  
 Vertical markets they focus on: Insurance companies, private medical coverage,  
 medical coverage belonging to workers.

- DIACOM S.A.

Represented by: Sr. Pablo Jononovich  
 Address: Av. Rivadavia 2358 - Piso 6 - Of. "D"  
 Postal Code: 1034 - Buenos Aires  
 Phone: 47-8221

- DIOGENES S.A.

Represented by: Ing. Juan Carlos Hernandez  
 Address: Juncal 754 - Piso 3 - Of. 29  
 Postal Code: 1014 - Buenos Aires  
 Phone: 312-2842  
 Type of hardware they focus on: PC, LAN.  
 Products: Diogenes Medico a packaged soft for medical diagnosis and reference.  
 Services: PC courses on Borland, Microsoft and Wordperfect software.



## - DIRECT S.A.

Represented by: Sr. Hugo Cella  
 Address: San Jose 583 - Piso 5  
 Postal Code: 1076 - Buenos Aires  
 Phone: 37-7752/7420

## - DITRA S.A.

Represented by: Sr. Martín D. Nissim  
 Address: Bernardo de Irigoyen 972 - Piso 2  
 Postal Code: 1304 - Buenos Aires  
 Phone: 23-7487/9831

## - ECOM CHACO S.A.

Represented by: Sres. E. Calvo/C. Santa Cruz  
 Address: Saenz Peña 352/8  
 Postal Code: 3500 - Resistencia  
 Phone: (0722) 24575/28523

## - ENGIMATIC S.A.

Represented by: Sr. Daniel Carbajal  
 Address: Diag. R. S. Peña 846 - Piso 10  
 Postal Code: 1016 - Buenos Aires  
 Phone: 22-0995

## - EROVA S.A.

Represented by: Sr. Ricardo A. Manilla  
 Address: Moreno 1850 - Piso 1  
 Postal Code: 1094 - Buenos Aires  
 Phone: 46-6874/79  
 Type of hardware they focus on: PC, Mini.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software, application software.  
 Services: Software start up, communications network.  
 Vertical markets they focus on: Banking, government, education.

## - ESTUDIO B.J. DELL'ORO Y ASOC.

Represented by: Lic. Bernardo Dell'Oro  
 Address: Viamonte 1481 - Piso 6 - Of. "A"  
 Postal Code: 1055 - Buenos Aires  
 Phone: 46-5261/0853  
 Type of hardware they focus on: PC  
 Operating system they focus on: DOS, UNIX, OTHER  
 Products: Base software, Application software,  
 Storage of images(replacing microfilm), other storage.  
 Services: Consulting, Projects, Methodology on  
 system decentralization.  
 Vertical market they focus on: Hardware stores,  
 Law firms.

## - ESTUDIO GONZALEZ FISCHER

Represented by: Ing. Alberto Chedufau  
 Address: Lavalle 1430 - Piso 6 - Of. "C"  
 Postal Code: 1048 - Buenos Aires  
 Phone: 40-4080/88/89

- ESTUDIO MORENO VIVOT Y ASOC.

Represented by: Ing. C. Moreno V./ Sr. J. Mayo  
 Address: Tucumán 829 - Piso 3  
 Postal Code: 1049 - Buenos Aires  
 Phone: 322-6717/7366/9105

- ESTUDIO MORGAN, BENEDIT Y ASOC.

Represented by: Sr. Adrián E. Sfeir  
 Address: Sarmiento 246 - Piso 1  
 Postal Code: 1041 - Buenos Aires  
 Phone: 34-7708 30-6740

- G.B. REYNA, H. AMOR Y ASOC. S.R.L.

Represented by: Sr. Gustavo Reyna  
 Address: Tablada 361  
 Postal Code: 5000 - Córdoba  
 Phone: (051) 44442/35633

- GRUSLIN MARTINEZ Y ASOC. S.A.

Represented by: Sr. Edgardo Díaz  
 Address: Suipacha 576 - Piso 2  
 Postal Code: 1008 - Buenos Aires  
 Phone: 322-0642/3428

- HARTENECK, LOPEZ Y CIA

Represented by: Sr. Jorge C. Grinpel  
 Address: 25 de Mayo 140 - Piso 6  
 Postal Code: 1002 - Buenos Aires  
 Phone: 334-2830/5198  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software; Application software,  
 consulting, inventory, software for accounting, integrated management system.  
 Services: Consulting, data processing  
 systems, marketing, organization of human  
 resources, strategic planning, assistance  
 to manufacturing plants.  
 Vertical markets they focus on: Services firms in general, retail and wholesale firms,  
 industry.

- I.T.A.C.O. S.A.

Represented by: Sr. Carlos A. Ortigosa  
 Address: Florida 32 - Piso 3  
 Postal Code: 1005 - Buenos Aires  
 Phone: 34-1434/7294

- IBM ARGENTINA S.A.

Represented by: Ing. Andrés Cabral  
 Address: Ing. Enrique Butty 275  
 Postal Code: 1300 - Buenos Aires  
 Phone: 313-0014

- INFORMATICA S.A.C.I.F.I.A.S.

Represented by: Sr. Raul Diaz  
 Address: Av. Mitre 100  
 Postal Code: 1870 - Avellaneda  
 Phone: 201-3222/3714  
 Fax: 201-3222/3714  
 Hardware they focus on: PC; Mainframe  
 Operating system they focus on: Dos  
 Products: Data base specializing in medication, indication of therapeutic effects.  
 Services: Image processing for I.D.'s, Data Entry, Data processing.  
 Vertical market focused on: Health, Urban transportation, Industry.

- INFORMATION S.A.

Represented by: Sr. Daniel Papa  
 Address: Av. Corrientes 1302 - Piso 10  
 Postal Code: 1403 - Buenos Aires  
 Phone: 40-0453 49-2327

- INSERT INFOR,INTEG S.A.

Represented by: Dr. Manuel Wiaggio  
 Address: Avda. de Mayo 605 Piso 7  
 Postal Code: 1086 Buenos Aires  
 Phone: 30-8043/8091/9921  
 Type of hardware they focus on: PC  
 Operating system they focus on: DOS  
 Products: Base software, application software and hardware sales.  
 Services: Software and hardware sales, training, consulting.  
 Vertical markets they focus on: accounting, law, medicine, restaurants and computer related activities.

- INSOFT S.A.

Represented by: Dr. Jorge Alberto Cassino  
 Address: Tucumán 861 - Piso 1  
 Postal Code: 1049 - Buenos Aires  
 Phone: 396-1094/1168/1179/2675  
 Type of hardware they focus on: PC, LAN, UNIX, Mainframe, Minis.  
 Products: Integrated Management Soft (Accounting, Personnel Management and Processing Control) that runs on DOS and is developed on Basic; and runs on Unix in its version developed on Informix.

- INTELIGENCIA APLICADA

Represented by: Lic. Martín Iglesias Ross  
 Address: Avda. Corrientes 830 - Piso 1  
 Postal Code: Buenos Aires  
 Phone: 396-0478 396-1380  
 Type of hardware they focus on: PC, Mini, others.  
 Operating system they focus on: DOS, UNIX.  
 Products: Base software, application software.  
 Services: Training for government employees, training for executives, training in the USA.

- INTERSOFT ARGENTINA S.A.

Represented by: Sr. Felix G.M. Racca  
Address: Córdoba 883 - Piso 9  
Postal Code: 1084 - Buenos Aires  
Phone: 311-9253/9259  
Type of hardware they focus on: PC, Mini.  
Operating system they focus on: DOS  
Products: Base software (data base for open systems),  
application software (installation)  
Services: consulting, training,  
Vertical markets they focus on: Petroleum, industry,  
supermarkets, cereals, hotels.

- ISPI S.A.

Represented by: Sr. E. Pereira de Lucena  
Address: Adolfo Alsina 1214 - Piso 3  
Postal Code: 1088 - Buenos Aires  
Phone: 37-0385 38-8362

- JORGE ESPAÑA Y ASOC. S.R.L.

Represented by: Sr. Guillermo J. España  
Address: Av. Callao 295 - Piso 1  
Postal Code: 1022 - Buenos Aires  
Phone: 40-3251/0345

- JOTAFI COMPUTACION INTERACTIVA

Represented by: Sr. Inagaki  
Address: Maipú 521 - Piso 6  
Postal Code: 1006 - Buenos Aires  
Phone: 322-6293 393-9133

- KEYDATA S.A.

Represented by: Sr. Miguel Champalanne  
Address: Crisologo Larralde 1801  
Postal Code: 1429 - Buenos Aires  
Phone: 70-4467/3281  
Type of hardware they focus on: PC, Mini,  
Mainframe.  
Operating system they focus on: DOS, UNIX,  
others.  
Products: Sales, maintenance, hardware upgrade  
Vertical markets they focus on: Municipal, insurance,  
systems to follow up on purchase orders.

- LAUTHEC S.A.

Represented by: Sr. Manuel Wiaggio  
Address: Pringles 365  
Postal Code: Buenos Aires  
Phone: 981-8430/8913/9315

- LOTUS DEVELOPMENT

Represented by: Sr. Carlos Abramo  
 Address: 25 de Mayo 460 - P.B.  
 Postal Code: 1002 - Buenos Aires  
 Phone: 311-3438/9 ó 312-3039  
 Type of hardware they focus on: PC, Mini,  
 Mainframe, others.  
 Operating system they focus on: DOS, UNIX,  
 others.  
 Products: Base software, application software.

- M.D. SISTEMAS S.R.L.

Represented by: Sr. Anibal Leites  
 Address: Bolívar 547 - Piso 1  
 Postal Code: 1066 - Buenos Aires  
 Phone: 34-6553

- MACEX S.A.

Represented by: Sr. Jorge Mac Loughlin  
 Address: Tucumán 825 - Piso 6  
 Postal Code: 1049 - Buenos Aires  
 Phone: 322-0631/0841

- MEGASISTEMAS S.A.

Represented by: Sr. Marcelo Silbert  
 Address: Reconquista 719 - Piso 6 - Of. "E"  
 Postal Code: 1003 - Buenos Aires  
 Phone: 312-4987  
 Type of hardware they focus on: PC  
 Products: Integrated Management Software

- MENSYS S.R.L.

Represented by: Sr. Carlos Villalba  
 Address: Balcarce 773 - Piso 6  
 Postal Code: Buenos Aires  
 Phone: 361-4431  
 Type of hardware they on: PC, Mini,  
 Mainframe.  
 Operating system they focus on: DOS, UNIX,  
 others.  
 Products: Base software, application software  
 on insurance companies and human resources.  
 Services: Preplanning, storage and commercialization,  
 clerical, consulting, hardware, budget, software development.  
 Vertical markets they focus on: Insurance, medical laboratories.

- MESICOM S.A.

Represented by: Sres. J. Perrone/S. Lopez I.  
 Address: Uruguay 390 - Piso 9 - Of. "A"  
 Postal Code: 1015 - Buenos Aires  
 Phone: 46-7122

- N.C.R. ARGENTINA S.A.

Represented by: Sr. Alberto J. Lopez  
Address: Av. Corrientes 1615  
Postal Code: 1042 - Buenos Aires  
Phone: 49-6671/79  
Type of hardware they focus on: PC, Mini,  
Mainframe.  
Operating system they focus on: UNIX, others.  
Products: Base software, linea 300, laptops 3120/3125  
application software on supermarkets, computers.  
Vertical markets they focus on: Banking, Medicine, Supermarkets, Education.

- NEWNET S.A.

Represented by: Raul Oscar Garrammone  
Address: Adolfo Alsina 424  
Postal Code: 1087 -Buenos Aires  
Phone: 331-8953

- NUEVO SOFT S.R.L.

Represented by: Sr. Jorge Omar Pace  
Address: Estanislao Ceballos 1449  
Postal Code: 2000 - Rosario  
Phone: 041-217933

- NUGGET S.A.

Represented by: Sres. T. Blatt/ R. Resnik  
Address: Talcahuano 750 - Piso 12 y 13  
Postal Code: 1013 - Buenos Aires  
Phone: 40-9981/9939/5081

- OMNI S.A.

Represented by: Sr. Jorge U. Garavelli  
Address: Carlos Pellegrini 1061 - Piso 7  
Postal Code: 1009 - Buenos Aires  
Phone: 312-2921/2895

- ORACLE ARGENTINA S.A.

Represented by: Ing. Sebastian Gunningham  
Address: Av. Leandro N. Alem 1002 - Piso 14  
Postal Code: 1001 - Buenos Aires  
Phone: 313-2111/2758

- PASARELLI ROBERTO A.

Represented by: Sr. Roberto Pasarelli  
Address: Mendoza 821  
Postal Code: 2919 V. Constitución  
Phone: (0461)74775

**- PERSONAL SOFT S.R.L.**

Represented by: Sr. Juan C. Baamonde  
Address: Av. Belgrano 225 - Piso 7 - Of. "A"  
Postal Code: 1092 - Buenos Aires  
Phone: 30-8270 34-8247  
Type of hardware they focus on: PC, Mini, Mainframe.  
Operating system they focus on: DOS, UNIX, others.  
Products: Base software, Application software.  
Services: Development  
Vertical markets they focus on: Health, Management, Advertising.

**- PINES S.A.**

Represented by: Ing. Daniel Linardi  
Address: Av. Callao 420 - Piso 11 - Of. A y B  
Postal Code: 1022 - Buenos Aires  
Phone: 46/5958/8099

**- PRODACE S.A.**

Represented by: Sr. Alfredo Villanti  
Address: Tucumán 1668 - Piso 2  
Postal Code: 1050 - Buenos Aires  
Phone: 45-8631 40-7488  
Type of hardware they focus on: PC, Mainframe  
Operating system they focus on: DOS, Others  
Products: Base software, Application software,  
Municipal registry system, Data processing.  
Services: Network installations, Municipal registry.

**- PROSOFT S.A.**

Represented by: Dr. Jorge A. Cassino  
Address: Tucumán 861 - Piso 1  
Postal Code: 1049 - Buenos Aires  
Phone: 396-1094/1168/2675

**- R. Y A. S.A.**

Represented by: Sr. Carlos Rolandelli  
Address: Av. Rivadavia 882 - Piso 5 - Of. "J"  
Postal Code: 1002 - Buenos Aires  
Phone: 331-5439/7674

**- R. Y D. S.A.**

Represented by: Ing. T. Sandor/ Lic. V. Chiesa  
Address: Montevideo 770 - Piso 11  
Postal Code: 1019 - Buenos Aires  
Phone: 41-4485 812-3869

- REIG VAZQUEZ GER Y ASOCIADOS

Represented by: Sr. Luis Correa  
 Address: Maipú 942 - Piso 22  
 Postal Code: 1340 - Buenos Aires  
 Phone: 311-8162/66  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Operating system they focus on: DOS, UNIX.  
 Products: Base software; Application software.  
 Vertical markets they focus on: petroleum,  
 construction, manufactured goods distribution.

- RER COMP S.R.L.

Represented by: Sr. Raul E. Rodriguez  
 Address: Tomas A. Le Breton 5014  
 Postal Code: 1431 - Buenos Aires  
 Phone: 52-4378

- RESULT SYSTEMS S.A.

Represented by: Ing. H. Huergo/J. Lopez  
 Address: Piedras 1052  
 Postal Code: 1070 - Buenos Aires  
 Phone: 27-2814/2875

- RH COMPUTACION S.R.L.

Represented by: Sr. Eduardo Garcia Daroca  
 Address: Tucumán 509 - Piso 1  
 Postal Code: 1049 - Buenos Aires  
 Phone: 325-7089/91/93

- ROLANDI SCHAFFER S.A.

Represented by: Sr. Federico Schaffer  
 Address: Carlos Pellegrini 445 - Piso 1 - Of A  
 Postal Code: 1009 - Buenos Aires  
 Phone: 322-5735/9014

- RUBEN L DE SANTOS Y ASOCIADOS

Represented by: Sr. Luis de Santos  
 Address: Av. Rivadavia 5427 - Piso 6 - "L"  
 Postal Code: 1424 - Buenos Aires  
 Phone: 901-7984

- S. Y M. CONSULT. COMPUTACION

Represented by: Srta. Monica Manzur  
 Address: Rodriguez Peña 694 - Piso 1  
 Postal Code: 1020 - Buenos Aires  
 Phone: 49-7757/7023  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software, Application software;  
 management, maintenance, development,  
 current accounts, treasury, wages.  
 Vertical markets they focus on: textile,  
 industry in general, wholesale trade,  
 retail trade, tire industry.



## - S.C.I. S.A.

Represented by:  
 Address: Colombres 107 - P.B.  
 Postal Code: 1177 - Buenos Aires  
 Phone: 981-6235/7634  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Operating system they focus on: DOS, UNIX, others.  
 Products: Base software, Application software for industry and manufacture.  
 Services: Banking, consulting  
 Vertical markets they focus on: Education, banking.

## - S.P.I. S.A.

Represented by: Sr. Guillermo Gulli  
 Address: Paraguay 643 - Piso 1 "B"  
 Postal Code: 1057 - Buenos Aires  
 Phone: 312-7125

## - SIGEBA S.A.

Represented by: Ing. E. Ladron de Guevara  
 Address: Suipacha 664 - Piso 6  
 Postal Code: 1008 - Buenos Aires  
 Phone: 322-2656 325-6210  
 Type of hardware they focus on: PC, Mini, Mainframe.  
 Products: value added networks (INFOBANCA:financial branches, Foreign Exchange, credit cards administration), develops integrated market systems, EFT, cash management systems.  
 Services: Consulting, system integration, data processing center, disaster recovery service and back-up.

## - SISTECO S.A.

Represented by: Lic. Juan C. Dollera  
 Address: Av. Pte. Figueroa Alcorta 3259  
 Postal Code: 1425 - Buenos Aires  
 Phone: 802-3078/6081/6486

## - SISTEMAS INFORMATICOS S.R.L.

Represented by: Ing. Héctor Vainer  
 Address: Montevideo 333 - Piso 4 "M"  
 Postal Code: 1019 - Buenos Aires  
 Phone: 46-2376/0937

## - SISTEMAS LOGICAL S.R.L.

Represented by: Lic. José Luis Ferreyro  
 Address: Sarmiento 1230 - Piso 4  
 Postal Code: 1041 - Buenos Aires  
 Phone: 35-2908/2603/3324  
 Type of hardware they focus on: Minis AS/400 and RS/600.  
 Services: Develops and commercializes soft, technical support of imported soft, consulting, development of Case Tools software.

**- SOFT MACEX S.A.**

Represented by: Sr. A. Gonzalez del Solar  
Address: Av. Corrientes 1132  
Postal Code: 1043 - Buenos Aires  
Phone: 35-9490/4625  
Type of hardware they focus on: PC  
Operating system they focus on: DOS  
Products: Base Software, Application software,  
Legal advice, Laws data base.  
Vertical market focus on: Law firms.

**- SOFT QUALITY S.A.**

Represented by: Srta. María A. Castellani  
Address: Florida 683 - Piso 5 - Of. 47  
Postal Code: 1005 - Buenos Aires  
Phone: 393-9962 322-0395  
Type of hardware they focus on: PC, Mini,  
Mainframe.  
Operating system they focus on: DOS, UNIX,  
Others.  
Products: Base software, Application software,  
Sales and payments collection system,  
Wages system.  
Services: Consulting, Marketing, IBM contract.  
Vertical market focus on: Steel industry,  
Banking, Textiles.

**- SOFTLAND S.A.**

Represented by: Lic. Luis E. Sraibman  
Address: Adolfo Alsina 2129 - Piso 2  
Postal Code: 1090 - Buenos Aires  
Phone: 953-4940  
Type of hardware they focus on: PC  
Products: Quatro Pro and Borland's full line,  
DR-DOS; PC-Tools.  
Services: Technical support.

**- SOFTMOTION S.R.L.**

Represented by: Sr. Fernando A. Papaleo  
Address: Libertad 877 - Piso 9  
Postal Code: 1012 - Buenos Aires  
Phone: 45-0309 49-7723

- SOFTWARE E SOLUTIONS

Represented by: Sr. Oscar Lagiglia

Address: Lavalle 1537 - Piso 1 "E"

Postal Code: 1048 - Buenos Aires

Phone: 40-3907 814-3137

Type of hardware they focus on: PC, nets,  
minicomputers, others.

Operating system they focus on: DOS, UNIX, others.

Products: Base software, application software (insurance, clerical)

Services: Consulting, employee selection, methodology for the development of systems, control and follow up of projects, training, information systems, organization and planning, hardware and software installation, administration of computer centers, selection and evaluation of projects.

Vertical markets they focus on: Insurance.

- SOLUCIONES INFORMATICAS S.A.

Represented by: Sr. Alberto Goldman

Address: Paraná 341 - Piso 1

Postal Code: 1017 - Buenos Aires

Phone: 49-5839

- STARTSIS S.A.

Represented by: Lic. Gustavo Calvache

Address: Serrano 2333 - Piso 4 "A"

Postal Code: 1425 - Buenos Aires

Phone: 72-8944 71-8763

- TECNOSOFTWARE S.A.

Represented by: Sr. Anibal Bidone

Address: Tacuari 439

Postal Code: 1071 - Buenos Aires

Phone: 334-6804/05

- TEKHNE S.R.L.

Represented by: Sr. Rodolfo Montonati

Address: Uruguay 239 - Piso 1

Postal Code: 1015 - Buenos Aires

Phone: 49-8727/8734

- TEKNODA S.A.

Represented by: Lic. María A. Dantur

Address: Esmeralda 155 - Piso 3

Postal Code: 1035 - Buenos Aires

Phone: 46-0445/2334

Type of hardware they focus on: PC, Mini, Mainframe.

Operating system they focus on: DOS, UNIX, Others

Products: Base software; IBM AS/400-OS/400, Novell. Application software; Engineering support; Development on IBM AS/400

Services: training, software courses, seminars, consulting.

Vertical markets they focus on: "cross" type services.

- TRAVERSO CASSINA NOVAS Y ASOC.

Represented by: Srta. Susana e. Moreira  
Address: Esmeralda 517 - Pisos 2 y 3  
Postal Code: 1007 - Buenos Aires  
Phone: 322-4235/8860  
Type of hardware they focus on: PC, UNIX.  
Products: Data entry systems, data bases.  
Services: Developers of packaged SW for transportation, agriculture management, banking, accounting for schools, retail shops, health insurance, hotel management, consulting in auditing of computer systems, software courses and system management courses, distributor of packaged SW to Fox Software and Globalink Translation system, downsizing and migration to PC.

- TTI S.A.

Represented by: Ing. Carlos E. Szarfsztejn  
Address: Sarmiento 663 - Piso 2  
Postal Code: 1316 - Buenos Aires  
Phone: 325-9941/8670

- UNISYS SUDAMERICANA S.A.

Represented by: Ing. Norberto Capellan  
Address: Maipú 267  
Postal Code: 1084 - Buenos Aires  
Phone: 49-4021/29

- VAZQUEZ, AGUILERA Y SZOSTAK

Represented by: Sr. Juan C. Vazquez  
Address: Bartolomé Mitre 777 - Piso 6 "A"  
Postal Code: 1036 - Buenos Aires  
Phone: 49-1644/1689

- WINDOW SYSTEM S.A.C.

Represented by: Sr. Daniel A. Scaglia  
Address: Av. Rivadavia 1615 - Piso 6  
Postal Code: 1033 - Buenos Aires  
Phone: 46-3705

- YA SISTEMAS S.R.L.

Represented by: Lic. Sergio Yannibelli  
Address: Riobamba 588 - Piso 6  
Postal Code: 1025 - Buenos Aires  
Phone: 45-9528/9531

- ZAMPATTI MAIDA Y ASOCIADOS

Represented by: Dr. Juan C. Zampatti Maida  
Address: Casilla de Correo 649  
Postal Code: 2000 Rosario  
Phone: (041) 46583/48859

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**E**

**Argentine Software Publications**



## SOFTWARE PUBLICATIONS

**Name:** Diógenes Software Información/Informática  
**Type of Publication:** Newsletter  
**Frequency:** Bimonthly  
**Editor:** Diógenes Software S.A.  
**Director:** Ing. Juan Carlos Hernández Dindart  
**Address:** Juncal 754 (1062) Buenos Aires  
**PH#:** 312-3842 **Fax:** 312-3842

**Name:** Big Network - Computación  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Lic. Alejandro Prince  
**Director:** Lic. Federico Cooke - Lic. Alejandro Prince  
**Address:** Av. Santa Fe 1707-P.3 (1060) Buenos Aires  
**PH#:** 812-6419 41-1586 42-7898 **Fax:** 325-5550

**Name:** Compuguide 4  
**Type of Publication:** Catalogue of Hardware, Software & Accesories  
**Frequency:** Quaterly  
**Editor:** Compuserve  
**Director:** Ing. Jose D. Adatto  
**Address:** Rincón 171 (1081) Buenos Aires  
**PH#:** 953-3419/8615/1610 951-9397 and 952-7001 **Fax:** 953-7040

**Name:** Tiempo Unix  
**Type of Publication:** Magazine  
**Frequency:** Bimonthly  
**Editor:** Unix Group Argentina  
**Director:** Claudia Segovia  
**Address:** Unix Group Argentina (Uniforum member) Suipacha 190 - Piso 9, Of. 903 (1008) Buenos Aires  
**PH#:** 35-4936/1543 **Fax:** 35-1592

**Name:** Computerworld Argentina Newsletter  
**Type of Publication:** Magazine  
**Frequency:** Fortnightly  
**Editor:** I.D.G. International U.S.A.  
**Director:** Ruben H. Argento  
**Address:** Av. Belgrano 406 - Piso 9 (1092) Buenos Aires  
**PH#:** 331-7672 & 34-5583

**Name:** Computerworld Argentina (IDG Communications)  
**Type of Publication:** Newspaper  
**Frequency:** Fortnightly  
**Editor:** I.D.G. International U.S.A.  
**Director:** Rubén H. Argento  
**Address:** Av. Belgrano 406 - Piso 9 (1092) Buenos Aires  
**PH#:** 331-7672 & 34-5583

**Name:** Manejo de la Información  
**Type of Publication:** Newspaper  
**Frequency:** Monthly  
**Editor:** M. Producciones  
**Director:** Juan Pablo Manchino  
**Address:** Carlos Calvo 791 - P. 1 "A" (1102) Buenos Aires  
**PH#:** 23-2907

**Name:** Tecnología Electrónica (Informática y Telecomunicaciones)  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Tecnología Electrónica  
**Director:** Ricardo Hugo Propato  
**Address:** San José 583 (1076) Buenos Aires  
**PH#:** 37-7185

**Name:** New Base  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Medios Ediciones  
**Director:** Sr. Garaicochea  
**Address:** Av. Génova 721 (2000) Rosario - Santa Fe  
**PH#:** (041) 301-596

**Name:** Suplemento Compu Magazine  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Magazine Publishing  
**Director:** Miguel Iglesias  
**Address:** Alsina 2129 (1090) Buenos Aires  
**PH#:** Fax 953-7635 951-0493/6071/8819

**Name:** Compu-lac  
**Type of Publication:** Magazine  
**Frequency:** Bimonthly  
**Editor:** Dr. Héctor M. Iglesias  
**Director:** Lic. Martín Iglesias Rossi  
**Address:** Av. Callao 1046 Piso 1 (1023) Buenos Aires  
**PH#:** 814-3126/3127 42-4365

**Name:** Network  
**Type of Publication:** Newsletter  
**Frequency:** Monthly  
**Editor:** Prince Cooke & Asoc.  
**Director:** Lic. Alejandro Prince  
**Address:** Av. Santa Fe 1707 - Piso 3 (1060) Buenos Aires  
**PH#:** 41-1586 42-7898 812-6419 Fax: 325-5550



**Name:** Compu Magazine  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Magazine Publishing S.R.L.  
**Director:** Miguel M. Iglesias  
**Address:** Alsina 2129 (1090) Buenos Aires  
**PH#:** 951-0493/6071

**Name:** Computerworld Argentina (Trends)  
**Type of Publication:** Newsletter  
**Frequency:** Fortnightly  
**Editor:** I.D.G. International U.S.A.  
**Director:** Ruben H. Argento  
**Address:** Av. Belgrano 406 - Piso 9 (1092) Buenos Aires  
**PH#:** 331-7672 and 34-5583

**Name:** Computerworld Argentina  
**Type of Publication:** Catalogue  
**Frequency:** Annual  
**Editor:** I.D.G. International U.S.A.  
**Director:** Ruben Argento  
**Address:** Av. Belgrano 406 - Piso 9 (1092) Buenos Aires  
**PH#:** 331-7672 and 34-5583

**Name:** Masterfile  
**Type of Publication:** Catalogue - Communications, Hardware & Software  
**Frequency:** Quaterly  
**Editor:** Master Medios S.R.L.  
**Director:** Héctor Chiesa  
**Address:** San José 764 (1076) Buenos Aires  
**PH#:** 38-4418 37-3633 **Fax:** 38-4418

**Name:** PC Magazine Argentina  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Editorial Vanidades S.A.  
**Director:** Santiago J. Villazón  
**Address:** Perú 263 piso 3 (1067) Buenos Aires  
**PH#:** 342-8946/86436/5178 **Fax:** 334-8053



**BUSINESS PUBLICATIONS THAT  
CARRY SOFTWARE ARTICLES ON A FREQUENT BASIS**

**Name:** Empresar  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** G y A Editores  
**Director:** Gustavo Averbuj  
**Address:** Uruguay 949 - Piso 8 Of. 32 (1015) Buenos Aires  
**PH#:** 42-2997

**Name:** Competencia  
**Type of Publication:** Magazine Argentina de Negocios  
**Frequency:** Monthly  
**Editor:** Larzabal Lugones Producciones S.A.  
**Director:** Jose Miguel Larzabal, Marcelo Lugones  
**Address:** Córdoba 875 - P. 14 "F" (1054) Buenos Aires  
**PH#:** 313-2062/312-1225/9938/311-2778

**Name:** Negocios  
**Type of Publication:** Magazine  
**Frequency:** Monthly  
**Editor:** Editorial Atlántida  
**Director:** Edgardo Silberkasten  
**Address:** Azopardo 579 (1307) Buenos Aires  
**PH#:** Editorial 331-4591/99

**Name:** Apertura  
**Type of Publication:** Magazine  
**Frequency:** Bimonthly  
**Editor:** Mind Opener S.A.  
**Director:** Mario Gabriel Griffa  
**Address:** Pte. R. Saenz Peña 651 - Piso 4 - Of. 63 (1035) Buenos Aires  
**PH#:** 46-2712/2870/0416/9742



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**F**

**Argentina's Vital Statistics  
and Economic Indicators**



## Argentina's Vital Statistics

**Type of Political Organization:** Presidential Democracy

**President:** Dr. Carlos Menem. Lawyer, University of Cordoba, Argentina.

**Period:** July 1989 - July 1995.

**Minister of Economy:** Dr. Domingo Cavallo. PH.D. in Economics, Harvard University.

**Central Bank President:** Dr. Roque Fernandez. PH.D. in Economics, University of Chicago.

**Political Parties:**

**Ruling Party:** Justicialist Party (holds Congressional majority)

**Major Opposition Party:** Union Civica Radical

**Capital City:** Buenos Aires

**Major Economic Centers:** Buenos Aires, Rosario, Cordoba and Santa Fe

**Population:** 32.6 million

**GDP Per Cápita:** US \$4062

**Total GDP:** US \$130 billion

**Currency:** Peso

**Exchange rate:** fixed, free capital market inflows and outflows; US \$1 = \$1 peso

**Major Exports:** Wheat (9%), corn (9%), meats (8%), manufactured goods (28%)

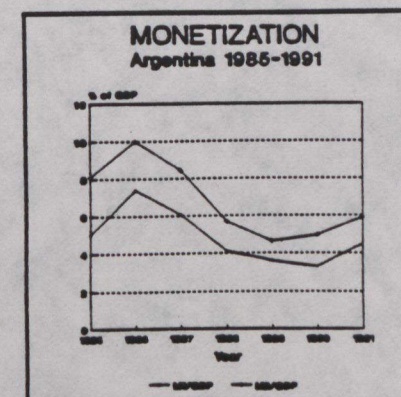
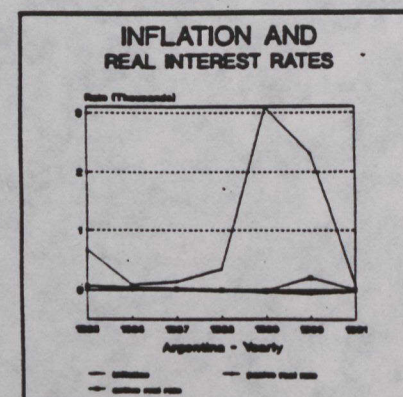
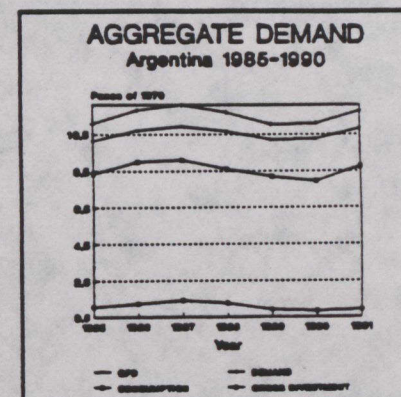
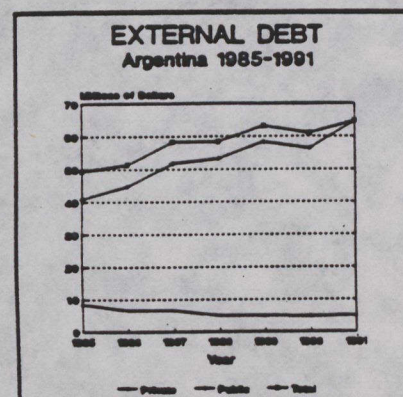
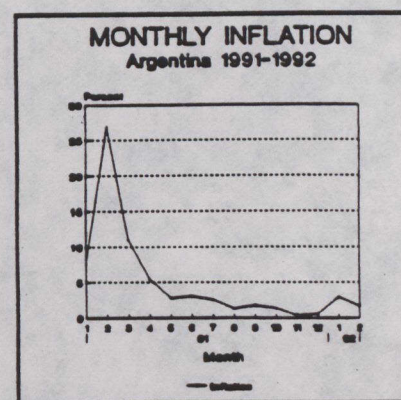
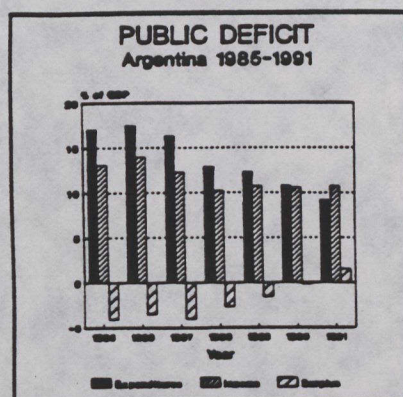
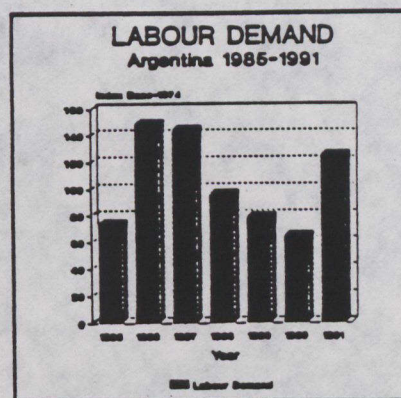
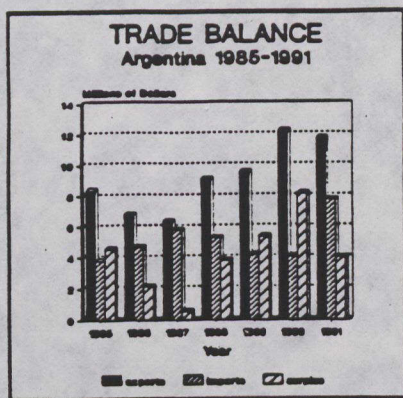
**Major Imports:** Non-oil intermediate goods (52%), capital goods (31%), consumer goods (9%)

**Top Trading Partners:** Russia, U.S., Brazil, Japan, Germany.





### Some Economic Indicators



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