

Colombia Information Technology Report Q2 2016

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Abstracts

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BMI View: Following a downward revision based on weaker than anticipated retail PC sales in H215, we now estimate the market contracted in local currency terms in 2015, while contracting by almost 29% in US dollar terms. Our forecast envisages 2016 as another challenging year, but the market will begin to turn positive and we forecast a CAGR of 7.3% over 2016-2020 as a whole to a value of COP9.91trn. Colombia, with strong economic performance that boosts purchasing power from 2017 and raises enterprise confidence, alongside a supportive policy environment, will make it a regional outperformer in the later years of our forecast.

Latest Updates And Industry Developments

IT Hardware Sales: COP3.45trn in 2016, rising to COP4.51trn by 2020, at a CAGR of 5.9%. After weak performance in 2015 and 2016 we believe there is pent-up demand for PC upgrades and replacements, which coupled with rising incomes, will drive strong growth from 2017.

Software Sales: COP1.23trn in 2016 to COP1.72trn by 2020, at a CAGR of 7.7%. The software segment is expected to develop rapidly both in terms of end-user demand and the growth of the local software development industry.

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