

Colombia Information Technology Report Q3 2012

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Abstracts

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BMI View: Colombia's IT market is forecast to increase to US\$3.0bn in 2012, up by around 11%, with our five-year forecast upwardly revised from Q212. Colombian IT spending is projected to grow at a CAGR of 12% during 2012-2016, driven by government ICT initiatives and improving infrastructure. The consumer-driven economic boom of recent years may have come to an end, but rising incomes and greater computer affordability will result in more spending on IT products and services. Per capita IT spend is projected to rise by 47% from US\$59 in 2012 to US\$92 by 2016.

Headline Expenditure Projections Computer hardware sales: US\$1.4bn in 2011 to US\$1.5bn in 2012, +10% in US dollar terms. Forecast in US dollar terms unchanged but there is considerable potential in government and business segments, where levels of investment are low.

Software sales: US\$434mn in 2011 to US\$486mn in 2012, +11% in US dollar terms. Forecast in US dollar terms upwardly revised due to analyst modification with most demand for basic solutions, such as enterprise risk management and supply chain management systems.

IT Services sales: US\$911mn in 2011 to US\$1.0bn in 2012, +13% in US dollar terms. Forecast in US dollar terms unchanged as around 75% of demand still comes from the large company sector. **Risk/Reward Rating:** Colombia's score was 52.3 out of 100.0. Colombia ranked eighth out of nine markets in the Americas region in our latest business environment ratings table, behind all of its regional peers with the sole exception of Venezuela. Despite the high growth potential of its market, Colombia's overall ranking was constrained by a low Country Structure score of just 50, joint lowest in the region with Peru.

Key Trends & Developments

The government's Vive Digital programme offers a long-term boost to the IT market, with a pledge to eliminate import tariffs on connectivity devices, and to take measures to enhance credit availability for such devices. Private credit growth has also started improving, and could mean an increasingly bright outlook for household consumption.

The business sector also represents a large opportunity, due to the relatively low levels of computerisation among small businesses in particular. According to government figures, just 7% of Colombia's small businesses are currently online, although such businesses represent 96% of all Colombian enterprises.

Investment in data centres, information management and security solutions are expected to be growth areas in the large company segment. Meanwhile, the government's ambitions to develop Colombia as a regional BPO hub, which have enjoyed some success, will generate more demand for back-end systems and services. Cloud computing remains a niche but interest is growing.

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