

# Colombia Information Technology Report Q4 2016

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Date: September 2016

Pages: 69

Price: US\$ 1,295.00 (Single User License)

ID: C11CE3FBE9DEN

## Abstracts

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**BMI View:** Colombia is a market with great potential due to relatively low penetration rates for PCs, software and solutions. Our core scenario is for an IT spending CAGR of 4.5% over 2016-2020 as the economy strengthens, with a potential tailwind from the formal conclusion of government conflict with FARC. Colombia does however continue to be vulnerable to external shocks such as a lower oil price. This downside was demonstrated in 2015 when oil prices resulted in a sharp depreciation of the peso against the US dollar, and a marked contraction in demand for imported devices and solutions.

### Latest Updates And Industry Developments

**IT Hardware Sales:** COP3.30trn in 2016, rising to COP3.62trn by 2020, at a compound annual growth rate (CAGR) of 2.3%. Downgraded outlook as evidence of PC substitution for smartphone spending mounts, eroding the growth potential offered by relatively low PC penetration.

**Software Sales:** COP1.25trn in 2016 to COP1.55trn by 2020, at a CAGR of 5.4%. The domestic software industry benefited from depreciation, which made it more competitive, but will face competition from global vendors for the spoils from modernisation over the medium term.

**IT Services Sales:** COP2.53trn in 2016 to COP3.29trn in 2020, at a CAGR of 6.8%. The cost-savings potential of IT services, especially outsourcing, cloud computing and smart services, will drive up adoption and boost market value.

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