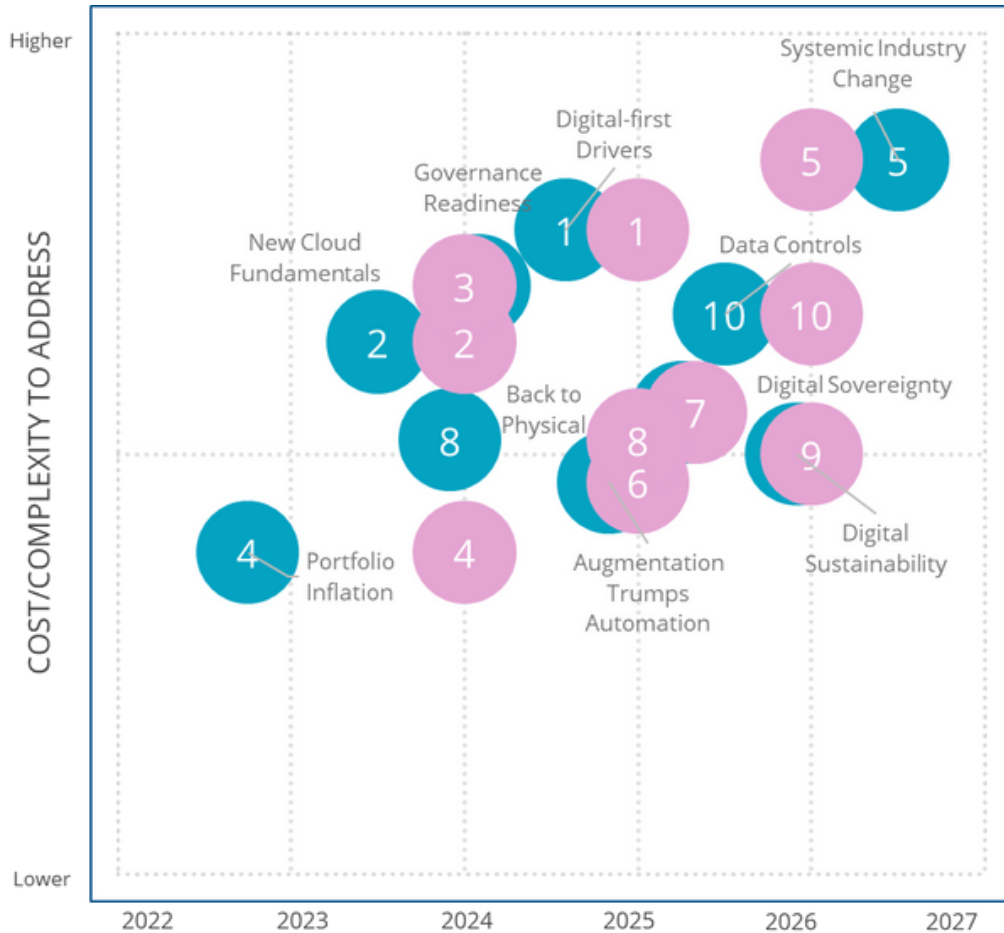


IDC FutureScape: IT Industry Worldwide & Latin America Implications - Fig. 1



- ① By 2024, digital-first enterprises enable empathetic customer experiences and resilient operating models by shifting 70% of all tech and services spending to as-a-service and outcomes-centric models.
- ② By 2023, 35% of Latin America Top 5,000 companies reset cloud selection processes to focus on business outcomes rather than IT requirements, valuing access to providers' portfolios from device to edge and from data to ecosystem.
- ③ By 2023, 40% of Latin America Top 5,000 companies use AI-assisted, cloud-linked governance services to manage, optimize, and secure dispersed resources/data, but 30% don't achieve full value due to IT skills mismatches.
- ④ By 2023, 40% of Latin America Top 5000 companies' IT budgets are redistributed due to adoption of integrated as-a-Service bundles in areas of security, cloud platforms, virtual workspace, and connectivity.
- ⑤ By 2025, industry leaders facing systemic or mandated transitions in the coming decade double IT spend for new environments but struggle to achieve the expected gains in IT operational efficiency.
- ⑥ By 2024, 50% of Latin America Top 5000 Companies gain twice as much, in terms of meaningful returns, on technology investments that augment employee/customer activities compared to ones that automate individual processes.
- ⑦ By 2025, regional divergences in data privacy, security, and placement/use/disclosure mandates force 90% of Latin American enterprises to restructure their data governance processes built on an autonomic foundation.
- ⑧ By 2024, 40% of Latin America Top 5,000 companies will shift half of their new technology hardware/connectivity spending to modernize and reconceptualize in-person experiences for customers and employees in their own locations.
- ⑨ By 2025, 40% of Latin America Top 5,000 companies have Digital Sustainability teams, tasked with assessing, certifying, and coordinating use of business and IT sustainability data and analytic platforms offered by ICT providers.
- ⑩ By 2025, public enterprises' valuations are based as much on confidence in data controls for proper/effective use of data as in financial controls, focusing increased spend on data-centric solutions.