



# La crisis como oportunidad

In a world atmosphere where it is spoken of crisis and the countries begin to adopt plans to mitigate their impact, the industry of computer technology isn't distant and it gets ready to confront this situation.

In fact, according to the analysts, the market of IT will have effects on its results. The world expense of products and services will decrease up to 3% in 2009, about 1, 66 thousand million dollars, although in 2010 this parameter will recover and it will grow up to 9%, in accordance with a Forrester Research study.

In accordance with the data contributed by the consultant, the market grew last year 8%, but the depression in United States and other countries is the main reason of the fall that investments will suffer this year, continued by a stronger dollar.

Some technological areas will respond better than others to the current events. The expense in software, for example, will stay equal to the figure registered in 2008 (388.000 million dollars) while the expense in communications, IT services and hardware will decrease, pointed out by Forrester.

Forrester is shows caution regarding the statements picked up in the report that are made standing in the belief that the economic situation will improve at the beginning of the second half of the year and that the strength of the dollar will decrease.

The analyst Andrew Bartels of Forrester mentioned factors like: lower energy prices, the better of the credit market and the forecast of a wide package of measures implemented by the new president of the White House like reasons to believe that the economy could recover before we can predict it. Although in the emergent markets this recovery will take some more than time.

Specifically in Latin America, in accordance with the IDC in their study presented on October, 2008, the increase of the investments in IT at worldwide during 2009 would decrease by the global financial crisis. The consultant modified his projections for 2009, being his expectations on the investment growth from IT, worldwide of 2.6%, USA of 0.9% and in Latin America of 7.8%.

According to the expectations of the economic growth post-crisis presented by the IMF in the October report, the growth of the PBI for Latin America would be of 3.2% in 2009. Consequently, IDC reduces expense growth expectation in IT for the region and added that there would be a decrease of 13.7%, before the crisis, to 7.8% under the new crisis scenario.

The most affected area in the region would be servers, with a negative growth of -2.1% in 2009 versus 2008, continued by printers with 1.7% and storage nets with an estimated growth of 2.8%.

The areas that will be affected by a smaller growth will be: hardware (new PCS, servers and computer nets); services (consultancy, development of measured applications and training); software (specific industry applications), and IT services (development of applications).

In this world atmosphere, Computerworld Colombia consulted with several sector leaders, and in spite of the international climate, the optimism was the common denominator, highlighting this moment, an opportunity to show that technology supports the productivity, and it is a development and competitiveness factor.

### **Strategies for the crisis**

In accordance with Marco Malfavon, communications director of Alcatel-Lucent for the CALA region, the perspective is that although we will see a contraction in the communications market, as a consequence of the world's economic crisis, in Latin America and particularly in the Andean region, during the 2009 we will continue to see a growth in communications and the services offered to final users. "In Alcatel-Lucent we have reorganized ourselves, with a new business model and organizational structure, to help our clients in the operations,

corporate and vertical market segments to take advantage of the mass use of Internet and communication services to expand the access to a broadband of services, to offer the users a more personal and more valuable experience, and at the same time, to reduce the costs and complexity to allow access to advanced communication services. This implies to combine the capacities of the communication traditional networks (security, integrity, quality, etc.) with the creativity of the new social networks and communication between individuals or final users.

On the other hand, Robert Vélez, Marketing Manager of AOC commented that the strategy is to focus in the growth of televisions. "The price of televisions has gone down to a level that makes it affordable to finance a television and its accessories."

Camilo Vidal, general manager of APC commented: "2009 will be a year of big challenges in the economic aspect due to the existent financial crisis. However, the situation in Latin America will be better than in other more developed countries. It is influenced because of the fact that Latin America is already more experienced facing a crises and to get past it. In fact, it stands out the peculiar way that people acquire technology in Latin America and especially in Colombia it is more mature, since companies prefer to acquire solutions, instead of buying IT equipment and services separately and in that sense the strategy of APC by Schneider is to offer integral solutions for Datacenter. Also, companies are investing in infrastructure, searching for efficiency, to reduce costs and to optimize processes, being optimistic towards the market."

The executive continued: "Although it is certain that there is an expectation for what could happen regarding world economics, it is also a fact that APC by Schneider Electric maintained its growth and its projects continue being executed. We have no proof that investments in Data Center have decreased to the point of impacting our business. We are prepared and positive regarding our achievements and what we will continue to achieve. Also, in our case, we continue our investment plans, supporting the region and we consider that the crisis is an opportunity to show how technology becomes competitiveness and advantage factors for companies."

On the other hand, Elkin Echeverry, Research and development manager for Compuredes, comments that it would be fatuous to deny the national and international reality that surrounds today's economies and the climate of business; "without a doubt we today confront different times and there are big probabilities that the difficulties can be accentuated in the future. Wisdom is a very desirable virtue and without a doubt our organization tries to gain that ability in a constant way by the development of our business activity, however, it is not less certain that today it's difficult to measure the impact that these crisis on other countries have in the economic deceleration of our country. To know

when, what sectors, in what proportions and what time are very complicated questions to answer, for the layman, but also for the expert in these matters, in such a luck that to mention concrete strategies on results so difficult of projecting is some quite venturous.

It is necessary to avoid at all cost that we all are so convinced about the arrival of the crisis, that our excessive carefulness finishes making it a reality, when the fundamental economic factors perhaps are much better than they are and that the real situations in other latitudes don't necessarily have such a direct impact, as some want to assign them, in our economy and finish this way creating a crisis where perhaps there isn't. In the measure that we maintain an appropriate proportion between carefulness and optimism in the investments, the expected crisis won't be presented or it will be even smaller."

The executive added: "Another form of enunciating this corresponds to the worn-out sentence that the crises are also opportunities and without a doubt it is happening this way now. Under our situation, planning is based on scenarios different from future (prospective), some without crisis, others with it in diverse grades, sectors and geographies and with its

Respective effects, which will be executed in the moment that signs of such a situation, become evident. The investments in TIC have traversal effects on a country's whole economy, since they can potentialize any type of economic sector, in public and private entities, as well as in organizations with and without animus lucrandi.

There is not a better element to reduce costs, to enlarge sales, to improve efficiency of our production and to increase the fidelity of our clients that the intensive and correct application of TIC to the nucleus of any business type. Now to obtain those improvements in times of crisis is even more important, so the investments in TIC at this time should increase, not to be reduced."

On this topic, Marcela Perilla, General Manager of Dell Colombia said: "Internally we are focused in managing our expenses and in recapturing our leadership in the costs area. We have announced company reorganization globally, through which we will align around four global segments: managerial, Pyme, consumer and public sector. To align our segments globally so that they are focused to the necessities of our clients, it will allow IT to decrease costs and redundancies through the company. It will also allow us to offer bigger value to our clients and gather profit for Dell."

According to the executive, "Equally, we have decided to focus ourselves in supporting our clients so that they can also face this economic environment that we find ourselves in. The current conditions are making companies look for

better technology solutions to an accessible price. That is one of the strengths of Dell. We can help facilitate that technology managers can increase the productivity through the simplification of their infrastructures of IT and therefore, save in expenses. This achieved through our products that are energetically efficient and that consume less energy, the virtualization and the remote systems management."

On the other hand, Jorge Andrés Osorio, manager of Aranda Software for the Andean Region mentioned that "we will continue investing in the Latin American market and we will speed up our development plans. We will increase our presence in Brazil and Mexico that are countries in those that we have relatively new coverage. The objective is to grow in sales, installed basis, quantity and partnership quality, to achieve first places of market participation, as we have achieved it in other countries of the region. There we see the biggest growth opportunity, because of the size of the economies and because our portfolio represents a great opportunity for those that want solutions that allow them to implement management processes operatively to become efficient and more strategic in the support than IT services give to the business. Although traditionally we have been quick developing solutions, we plan to accelerate our roadmap to be able to offer more and more solutions that will help our clients during the crisis."

Alvaro Chaffinch Rengifo, general manager of Atento Colombia recognizes that we are entering a crisis. "We are a country that depends on few markets like the United States; if they have problems, in Colombia there will also be problems. Maybe we'll have favorable circumstances, as a profitable financial system and a relatively stable construction industry, but our dependence on the developed world Leads us to crisis: the internal and external circumstances join together; 2009 will be a difficult year."

"The important thing is to be able to transform the crises into opportunities. We need an open mind to bring services that can generate employment. If we don't generate exportation, we won't overcome the crisis; it is necessary to look further. We are very superb; we should be humbler to recognize our failures and to design solutions; to be realistic and with a more positive patriotic sense."

Likewise, Eugenio Freire, Territory manager of Autodesk added: "In Autodesk we think that crises are opportunities to begin deep changes in the structures of the organizations. The crises are good as an inflection point for new projects that can make companies more competitive in difficult and unpredictable environments. We think that Autodesk technology can help in the transition because it will allow enlarging the use of technologies that allows the creation of products and the generation of projects in a digital way, minimizing the development costs and maximizing the return of the investments carried out in new projects."

"We are in crisis; it is real worldwide and locally. In Colombia it will hit with a smaller effect because of the well being of our financial system", Simbad Ceballos commented, manager of Cisco for Colombia. Coincides in pointing out that the crisis represents opportunities: "more intelligence is needed; it is necessary to be more creative stricter in the expense."

"The companies have to review the processes looking for a reduction in costs without affecting the services; for example, plans of energy consumption reduction by means of the replacement of platforms or the decrease of flight trips through teleconferences and the use of collaboration tools."

The process reorganization and modernization and the use of current technologies can, according to Ceballos, help the companies to be more efficient and more profitable and to overcome the crisis; the automation and the integration of processes is a good initiative.

"Definitively, we have to think more, to be more creative and become more collaborative; to learn how to manage the change", Ceballos commented. "We have to learn how to make a better country: country transformation is the slogan of Cisco that looks to motivate the transformation of the society by means of technology. The crisis is an opportunity to change companies, services, rectors but, more important, individuals."

On the other hand, Alfredo García, CA Colombia and Peruvian Manager expressed: "the economic crisis is a world reality and Colombia can receive this same wave generating a slight reduction in investments. There's where it is important that the companies have technological solutions to optimize their operations and investments and can equally reduce costs, without stopping to offer their clients an opportune, sure and efficient service.

Our mission is to provide the tools so that the clients make their decisions better and they can provide a better service, mitigating the investment risks and to ensure its more valuable asset, being information. In fact, the effective administration is Vital for the success of an organization, especially in the climate of current economic challenges."

In accordance with the CEO, the market in general, at level of hardware purchases may decrease, but software and services markets will maintain their rhythm, since there is where value is generated for companies and where there are tools that allow companies to minimize their costs or to project profitable investments. "For CA this crisis moment is seen as an opportunity of growth, since our software helps companies to reduce costs, to assure information and to govern its investments and projects in all the areas of the company."

Juan Fernando Mallet, manager of I-Solutions, unit of business of the University Institution Ceipa, commented, "the same as any company, we are exposed to a

reduction of the demand of our services - either of products of formal education as of the managerial services - this would make tangible the internal crisis of Ceipa. Our strategies are simple: to concentrate on lending a different service, but that our students feel it. This strategy has to do with the redesign of products, involving technologies to the service of education, improving the pedagogic components of our programs and making visible to the students these differences, for example 40% of the time its virtual and to concentrate the study on a single area of the knowledge by means of the thematic nucleus."

The executive explained: "To offer a different service we have worked in the culture of our organization, making special emphasis in the conscience of taking care of the client. We advance, for example, an area of student management that receives and processes all student applications this way, he doesn't have to be remitted to several areas of the University for financial credit or for a reservation of a classroom, but rather their adviser takes charge of all the corresponding steps. This, in our sector is different and it is highly valued by the student community."

"In the financial aspect, we have maintained a culture of austerity and of taking care of all the resources rationally, without falling in meanness neither in mistreating the income of collaborators and professors."

Another strategy will be the diversification of admission, but concentration in the service. "To be a business school it consists on opening nodes in different cities where we believe that we have a market opportunity. We have nodes in Barranquilla and Pereira, that which allows us the reception of virtual students and the increase of student population, it diversifies risk and income improvement. We equally, open up to offer the managerial services in those cities."

"I believe, in final terms that this crisis will feel, but where it first felt in the mind of the community and this effect can even be more serious than the normal fall in the economic cycle. We have tried not to get scared, we are also aware that a crisis has big opportunities and we are attentive to find ours."

Hugo Espinoza, Citrix Latin America director of the SAM Region, proposed some strategies for the survival of business. The first one is to consider the general value of projects: when the administration presses to the IT department so that it reduces

Costs, the executives frequently spread to make quick decisions to lower the costs that make short term sense, as reducing personnel or canceling projects. However, any decision of this type should focus on give a competitive positioning or a strategic value to the IT operation when the problems have been left behind. Always evaluate the risks associated with the instrumentation of each project, contrasting them with the risks of not making it. They should

also consider which projects are not aligned with the long term corporate managerial goals, since these projects are the first ones that should be eliminated.

The second strategy recommended by Citrix is to consider the total cost of the managerial administration: the first thing that should be made before deciding the measures to take, are to be applicable to the budget or the reduction of personnel, it is to give a new look to all the associated costs with the managerial administration. This should not include alone the associated costs with IT, as storage and backups, but also the indirect ones as the space cost for offices, electric power and trips. Once established this, the IT department could contribute to make savings inside the company like, for example, suggesting to move to a remote workplace, besides making savings in the own IT department implementing measures as storage and remote servers. The third strategy, according to the executive is to protect the data: in spite of the measures to reduce costs, in a recession inevitably some personnel will be lost and it is vital that the management and the chief department are prepared for the challenges presented by this situation. One of the biggest concerns is to guarantee that the sudden loss of potentially key personnel doesn't equal in particular to the loss of information that can end up being crucial for the business, in particular, in very regulated markets. When maintaining the information stored centrally, allowing its access according to the necessity, the companies can have the security that sensitive and critic information for missions will be protected automatically, allowing the personnel to make their work without carrying the responsibility of protecting the data.

In the same line, Alberto Gross, CLAdirect president, made the following recommendations. First, to understand with more precision the necessities of the clients. In crisis, the market necessities change quicker, in some cases in an unexpected way. Second, to prioritize the management of the "economic resource": to Optimize the available resources. Third, to determine the investments and strictly important expenses. Then, to make the necessary adjustments on time, independent to its difficulties; to have the flexibility of accepting changes also takes priority to grow business. To survive is more important than arriving first. To conclude, he suggests that companies are focused in their main business and where more value is generated.

The executive delimited: "The studies indicate that in USA 19% of the IT sales is to the financial industry, continued by government with 14% and manufactures with 13%. The financial sector is one most affected, therefore, sales decrease is expected in this sector. However, each crisis is an opportunity, and an important part of IT is oriented to optimize resources and to achieve that the organizations are more effective, two tasks that become relevant in the current situation. Possibly there will be better moments and those IT companies that make the correct decisions, intensify the market

necessities and invest in appropriate research and development they will be strengthened."

Of another side, María Clara Choucair, manager of Choucair Testing, her company at this time is cautious in its investments and it is aware of the importance of continuing evolving in the creation of new products and the improvement of its processes, towards increasing its efficiency and productivity, in a stage where these two variables are presumed to be of high importance for their clients.

Ernesto Núñez, Regional manager of Sales of D-Link Latin America, manifested: "worldwide we are in a restructuring stage, of market focuses and in this process we are carrying out many changes, creation of new products and solutions for the consolidation of the business segments that we manage and services as well as a complete program of trainings and certifications."

Eduardo Rotates, Manager of HP Colombia explained: "In moments like those that we are living, a company leader like ours, reinforces the brand, it increases their innovation capacity, stimulates their employees to think different, to come closer to our clients, to create the tendencies of the market and all this with a cheerful and positive attitude."

On the other hand, Ricardo Marulanda, Microsofts New Technologies popularization manager emphasized: "In times of crisis, uncertainty or not, technology offers tools so that the companies reduce costs and become more efficient; it helps organizations to operate in a more intelligent and more strategic way and to invest in technology it helps organizations to create conditions to grow with more speed.

Microsoft Mentions the reflection of Dominique Strauss-Kahn's reflection, General Director of the International Monetary Fund who affirms: "The fear dynamic is potentially catastrophic, but this dynamics can be destroyed. Independently to the problems in the financial system, the considerable improvements of the last years in the fields of the technology, the productivity and the social progress - the true foundations - are a genuine testimony of the globalization power as force for the general well-being. It can be very late to avoid a recession in the developed countries and to decrease their appearance in low resource countries. But it is not very late to avoid a global depression."

"Dominique Strauss-Kahn's comment doesn't seek to generalize the feelings of fear and uncertainty that brings to the companies difficult economic times. Better, it emphasizes that in technology, productivity and social progress there are procedures to be ahead in moments like these. It is then to find the best scenarios that help companies to save time and money, to impel their efficiency, to be equally or more productive to maintain the competitiveness and the

growth of the business", Jorge Silva added, general manager for Microsoft Colombia.

"There is no doubt that this it is the moment in which managerial leaders should evaluate the best form of using their resources to face the economic uncertainty that runs during present time. People are always those that make the difference and they need the appropriate tools to achieve it. Technology, without a doubt, carries out an important role in helping companies responding to this uncertain economic atmosphere with money, time savings and promoting the productivity and the growth of the business", Jorge Silva concluded.

On the other hand, Carlos Flórez, Netsac general manager Netsac highlighted that "the strategy is simple: to commit people to understand a more austere model, more judicious and more precise in their execution; so that once its mastered, it becomes more easily assimilable and applicable in the organization. To potentialize the human resource like an immaterial asset of our company will be our banner for 2009."

Juan Carlos Restrepo, Territory Account Manager - Juniper Networks Enterprise and Managed Services for the Andean region, Caribbean and Central America, said: "We believe that 2009 will be a positive year for us. Still with the turbulence of the world's economy, the foundations of the long term growth of the industry of networks of high performance are good. As an example, there are different points that can be pointed out as indicators. The number of people that use Internet continues growing. The digitization of contents, including the video content, is accelerating. The consumption of digital content through a wide range of devices continues increasing. The companies will have to reduce their expenses dramatically to be competitive and the main way to achieve it is to implement the technology of communications to reduce many operative expenses."

In this scenario, the executive continued, "the companies need, more and more, to make constant comfortable changes to challenges that the environment will present them. In front of this, Juniper continues with its commitment of surrendering so much as to the service suppliers as to the corporate market, a complete and integrated infrastructure solution of networks and security that will respond to the necessities of our clients. In 2009 we hope to have a very positive year and of growth in the region. The idea is to continue with the work that we come developing and we continue with the incorporation of new products, amplification of the briefcase solutions that, of course, allows that from current clients as potentials clients to see in Juniper a complete and integrated solution of infrastructure and security that will fit their requirements."

Pierre Rodríguez, Polycom marketing manager, explained: "Many companies will have to make more, with less this year. Basically most won't grow in people (in fact they will probably reduce the labor work force) but they will still have to

maintain their operation. We recommend that the companies look at investments in technology in a more strategic way. For example, to reduce the budget of trips and to give sessions of training, the companies can invest in systems of collaboration and videoconference, without affecting the productivity and the relationships. Therefore, it is suggested that companies invest in high technology of solutions that will accelerate the return on investment. Most of the investments will be long term and that they can only have a return of the investment (ROI) of 12 months or more, be probably delayed to 2010. In 2009 the companies will either invest in the things that can have a strong short term impact in the business, to help to reduce the costs and to increase the productivity significantly. This is the reason for which the videoconference has grown strongly in the last months."

Diego Dzodán, SAP Colombia general manager, clarified: "SAP is not in "crisis mode" but prepared to confront uncertain times in the world economy. We are a company centered in the necessities of our clients, and for that reason we offer them the tools so that they can reach through and become stronger and complete when better times arrive. SAP presents options and facilities so that the companies can invest in technology that allows them to have efficiency, flexibility and visibility

to make business decisions. Initiatives like Best-Run Now: a group of packages that combine software, financing and services to help the clients to negotiate their costs and liquidity, to reduce expenses and to administer their labor work force inside a complicated global market, as they plan their future growth, it is presented as a support and a solution to investment in technology, in times of crisis."

"In a same way we launched a special financing offer that contemplates rates up to three points below the market, called SAP Financing, unit of SAP FINANCING, the company provides facilities to the Colombian companies to replace its installed bases by new technologies that will make more efficient the processes and will support the objectives of the business. This way, we provide the whole necessary support so that in the last trimester of the year can face the economic conditions better."

On the other hand, Pedro Castro, Sonicwall manager for Colombia and Andean region, added: "The business enter a year of big challenges. The world of the business, just as we knew it, is constantly changing. The companies that will come out unhurt of the storm will be those that can adapt and transform challenges in opportunities, at the same time that they can incorporate a bigger rendition of bills, security, flexibility and economy inside their business operations. For the technology suppliers, now more than ever, the viability of the companies is based on the answering capacity in providing sure, effective and affordable solutions to help overcome the financial challenges of our time."

The executive continued: "Looking to the future, the companies will have to think creatively to stand strong over evolution tendencies in amid stricter regulations, a great potential risk for loss of data, the increase of population's distance workers, the increase of third align of the lenders' of IT function services, as well as a demand of functionality of critical mission, in relation to the cost-performance, in the value of IT investments."

In accordance with Juan Camilo Quintero, Tecnova Executive Director of the Corporation, the strategy is to be very careful with not very strategic company expenses; to invest in innovation and technological development; to maintain a low indebtedness and to learn about the crisis to reduce future risks.

According to, Fabio Sáenz, Teradata general manager for Colombia, the company has consolidated its briefcase of solutions with the inclusion of new platforms, appropriate to the different necessities of the organizations, so much from the point of view of maturity in the use of information like of the budget readiness, going by the characteristics of each one of them as for business type, number and clients characteristic and, in general, thinking of having a flexible offer with an appropriated entrance point adapted for different organizations that allows the obtation of expected return on the investment in very short time and with a level of very controlled risk."

To conclude, Hugo Fernando Valderrama, High valued Consulting president, WSI, the strategy of his company it is to sell more; to enlarge the size of the market, getting more clients in territories not yet visited. "In our case, there is a great opportunity because the easier way of growing is using internet consultancy and high management. We are specialist in growths during times of crisis.