



The New Partner Agenda

Infrastructure, Data & AI Modernization

Amid Margin Pressures and Platform Opportunities

Latin America

Oscar García

Research Manager,
IDC Latin America

August, 2026

Presentation prepared for:

Hitachi Vantara

Partner Summit 2026
Latin America



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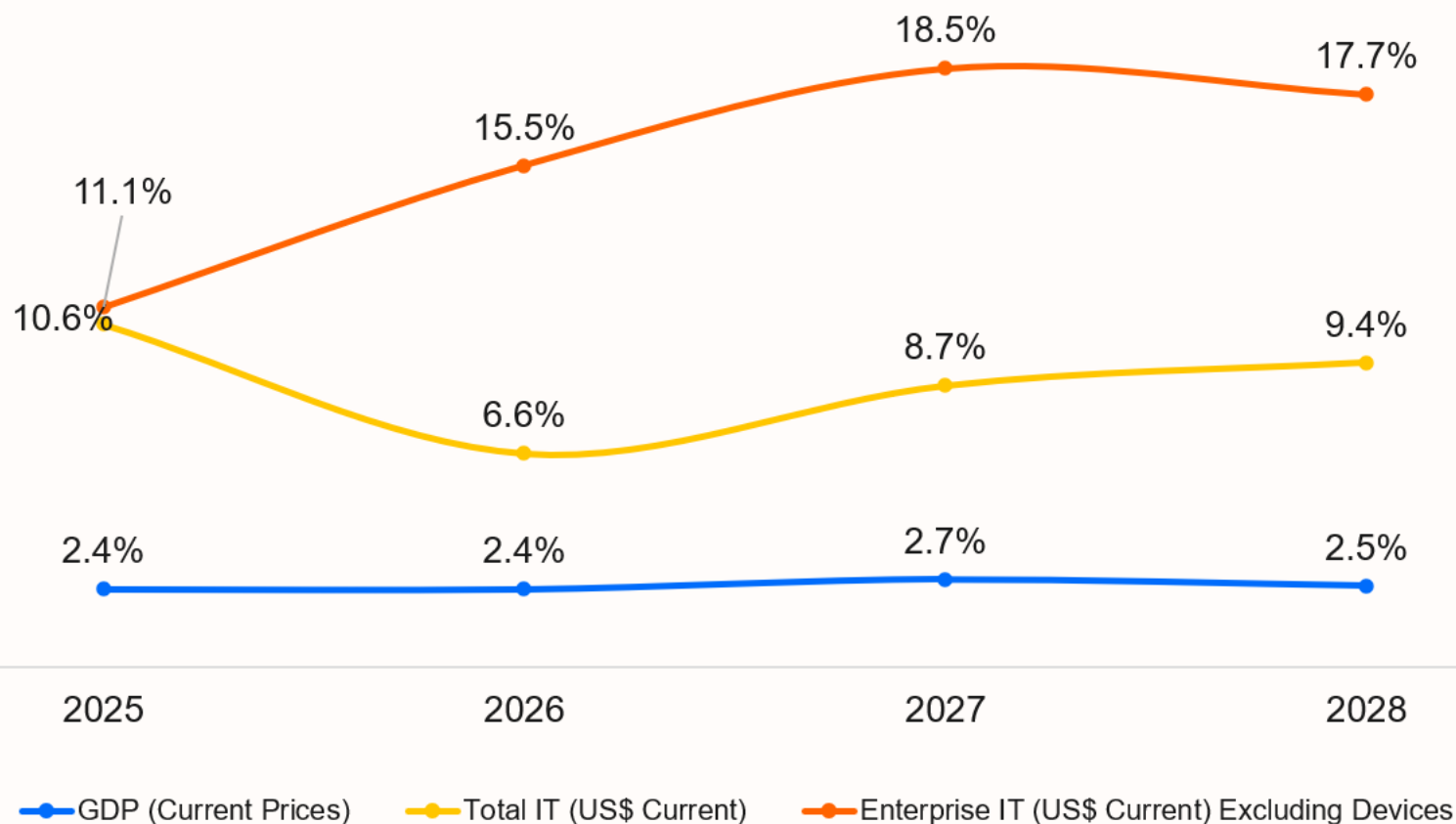
The CIO Agenda:

IT Investments, Enterprise Storage, and AI as
Business Accelerators.



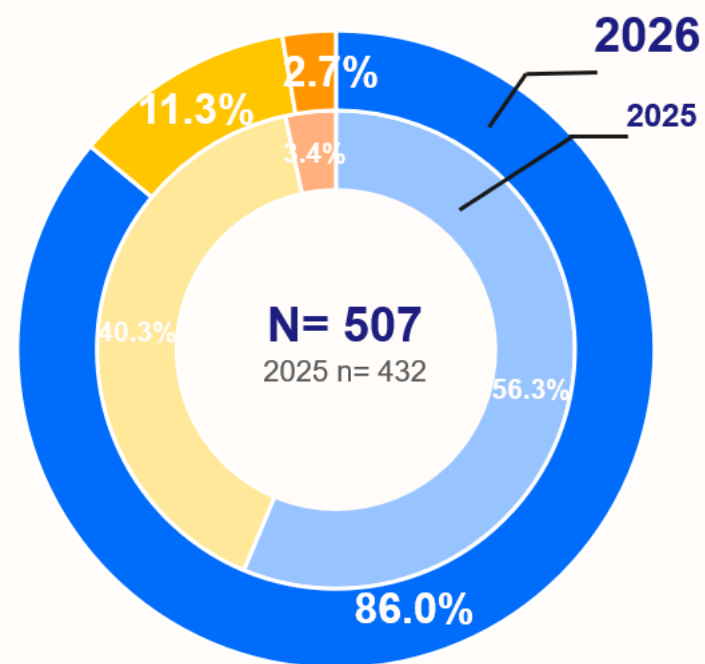
Enterprise IT Drives Resilient Growth in Latin America

GDP and IT Market Growth in Latin America (%)*



Source: IDC Worldwide Black Book Live Edition, July 2026. IMF, July 2026

Do you expect your organization's IT spending to increase, decrease, or remain the same compared to 2025?



Source: IDC Investment Trends Survey 2026, April 2026



Latin America ICT 2026: The Complete Market Map. Segments, Figures, and Where to Compete

Total Enterprise ICT Market · Latin America 2026

US\$ 104,828M



Traditional Infrastructure

US\$ 7,863M
in servers and storage.

Annual Growth: 6.7%
19% of spending related to AI.

Key verticals: SP, FIS,
and Manufacturing.

IaaS on Public Cloud

US\$ 9,802M

Annual Growth: 18.5%
The main driver is hybrid environments.

Key verticals: FIS,
Services, Retail, and SP.

Security

US\$ 5,760M Security in products (HW+SW)

Annual Growth: 13%
Products with AI and observability.

Key verticals: Retail,
Telecom, SP, and FIS.

AI and Gen AI

US\$ 15.5 B
for AI services and software

Annual Growth: 125.7%
Greater interest in AI agents.

Key verticals: FIS, CPG,
Retail, and Telecom.

Applications

US\$ 30,978M includes SaaS

Annual Growth: 9.0%.
Application modernization and AI agents.

Key verticals: Telecom,
Manufacturing, and FIS.

IT Services

US\$ 35,987M
Managed Services and consulting/integration

Annual Growth: 8.9%.
Application, AI, Cloud, and security modernization

Key verticals: Telecom,
CPG, Retail, and FIS.

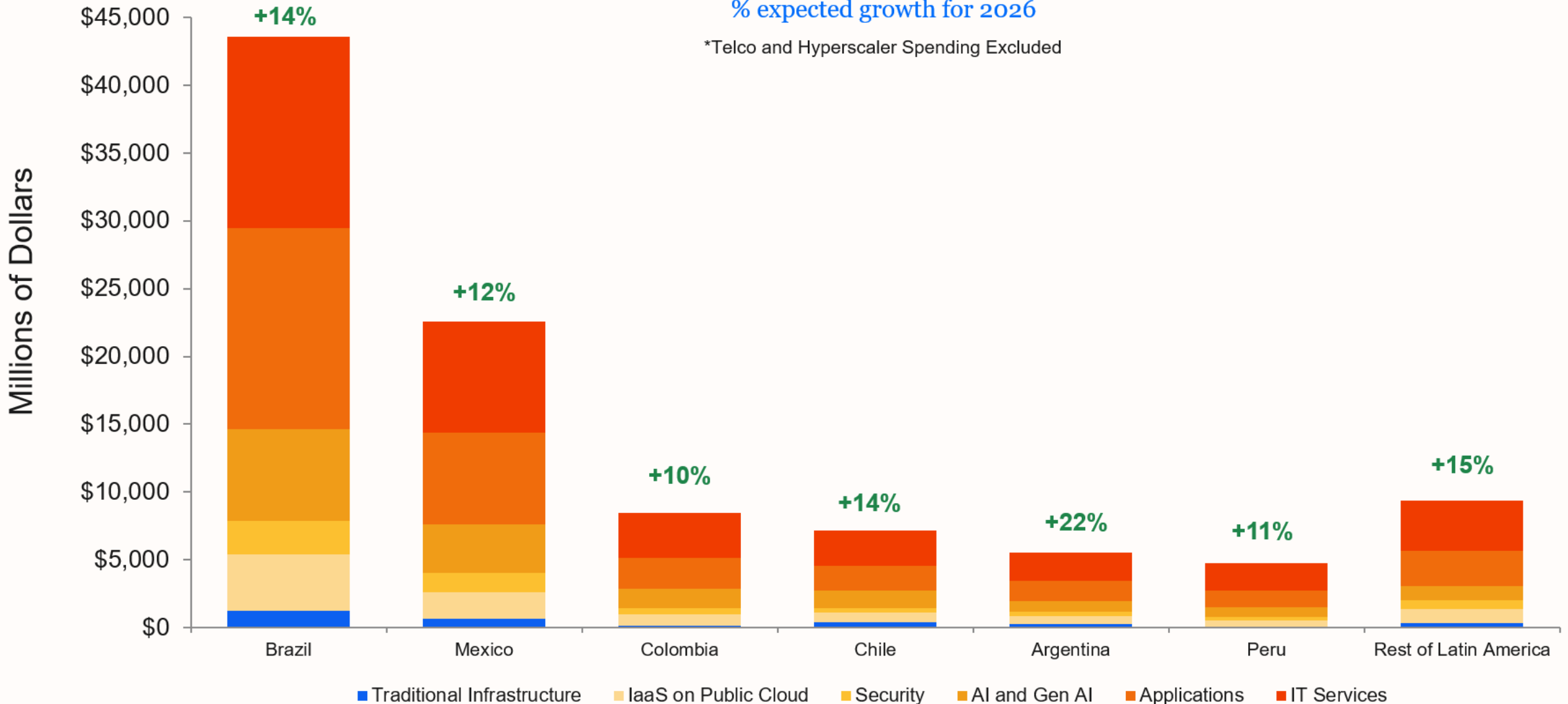
*Telco and Hyperscaler Spending Excluded



Total Enterprise IT Investment in Latin America by Country — 2026 (US\$M)

% expected growth for 2026

*Telco and Hyperscaler Spending Excluded

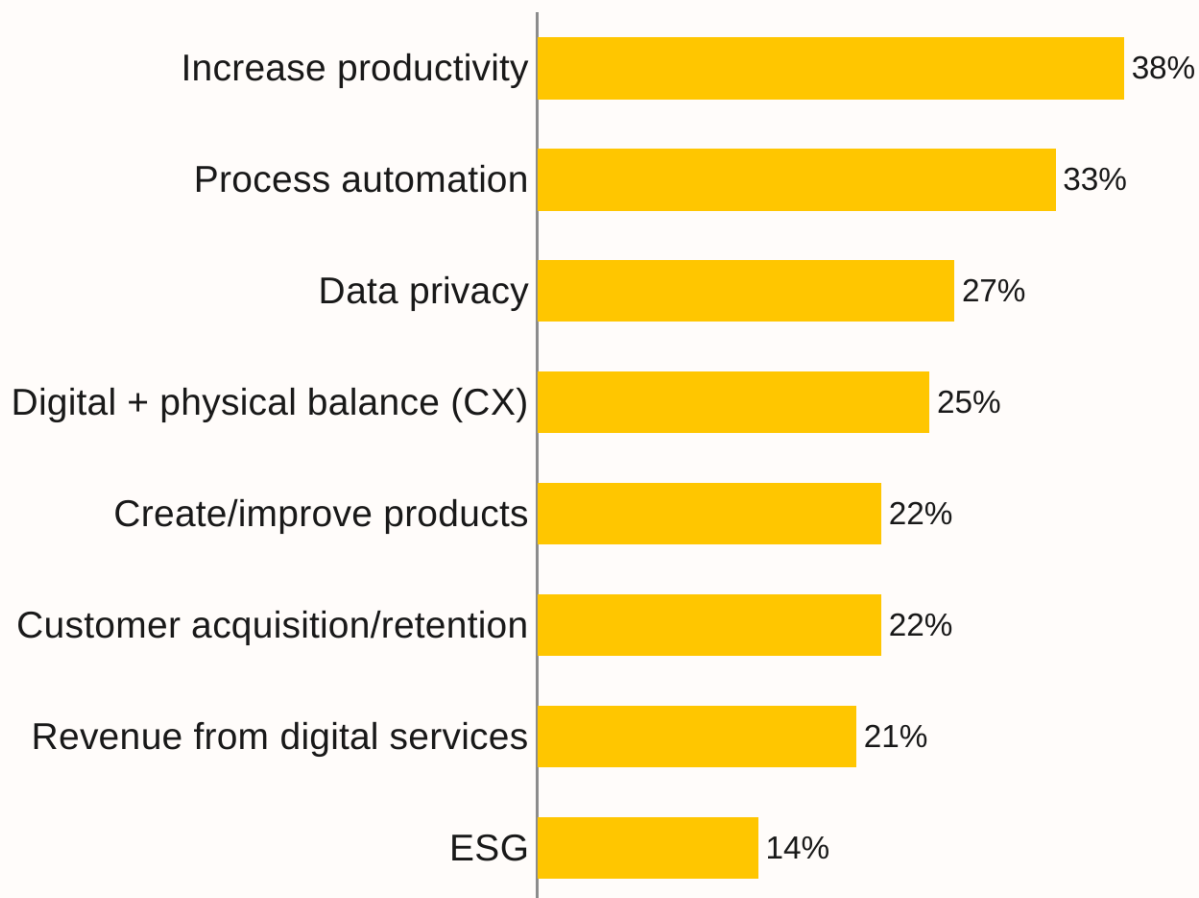


Rest of Latin America includes Central America, the Caribbean, Bolivia, Paraguay, Uruguay, and Ecuador.

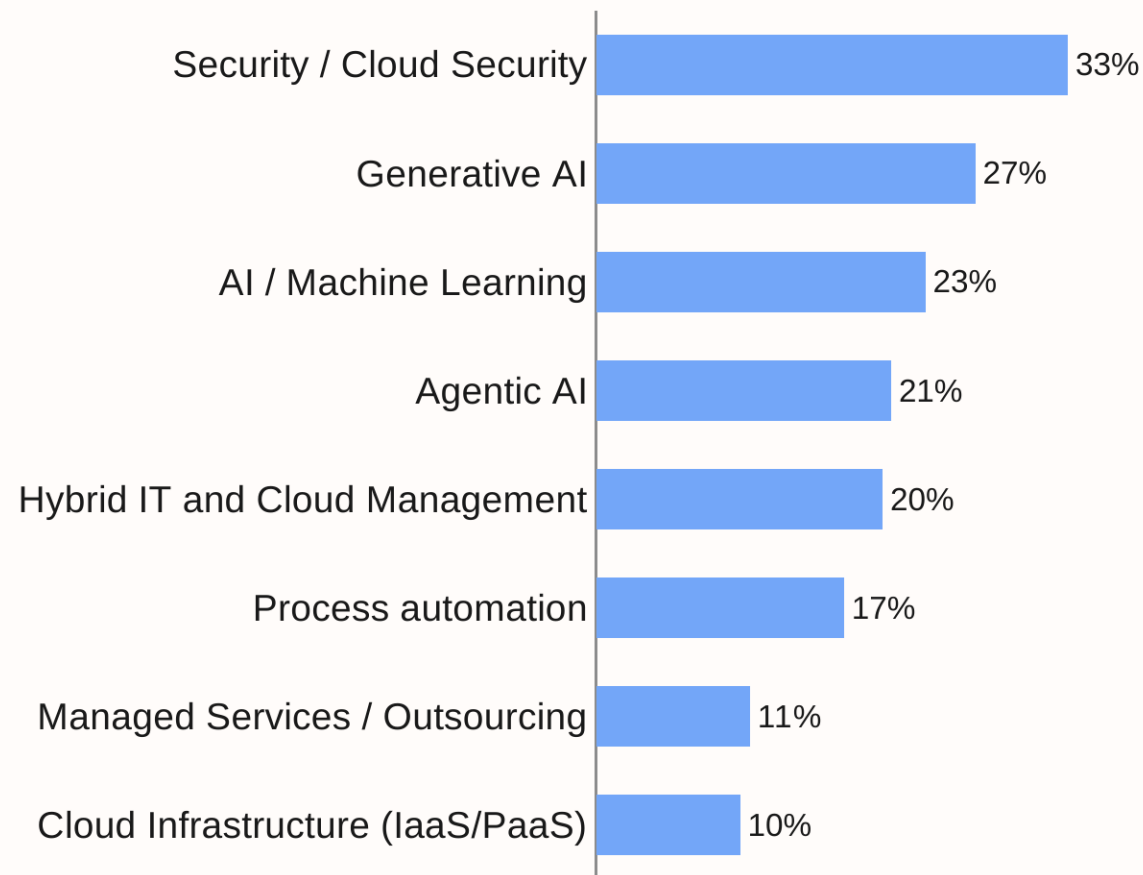


Automation Leads Business Initiatives; Intelligence and Security Are Key to Achieving It

Top Business Initiatives Latin America 2026



Top Enterprise IT Initiatives Latin America 2026



Security, AI, and Data Lead the Agenda.

Top 7 IT Topics by Strategic Level in Business Transformation, 2024, 2025, 2026
(ranked by the percentage of companies that indicated each topic, Multiple Choice)

Security

IT Security / Cloud

37%

Generative AI

31%

AI / Machine Learning

28%

Agentic AI

24%

Hybrid IT and Infrastructure

23%

Data Management Platforms

22%

Process automation

17%

Intelligence

Infrastructure

2024

2025

2026



Top 3 IT Topics by Strategic Level in Business Transformation – By Country (Multiple Choice)



Brazil

- 1 45.6% IT Security / Cloud
- 2 36.9% Generative AI
- 3 27.2% AI / Machine Learning



Mexico

- 1 32.9% IT Security / Cloud
- 2 30.5% Generative AI
- 3 22.0% AI / Machine Learning



Colombia

- 1 31.6% IT Security / Cloud
- 2 28.1% AI / Machine Learning
- 3 24.6% Process Automation



Chile

- 1 28.1% Agentic AI
- 2 24.6% IT Security / Cloud
- 3 22.8% Generative AI



Argentina

- 1 36.7% Generative AI
- 2 30.0% AI / Machine Learning
- 3 23.3% IT Security / Cloud



Peru

- 1 40.4% IT Security / Cloud
- 2 24.6% Agentic AI
- 3 24.6% AI / Machine Learning



Rest of Latin America*

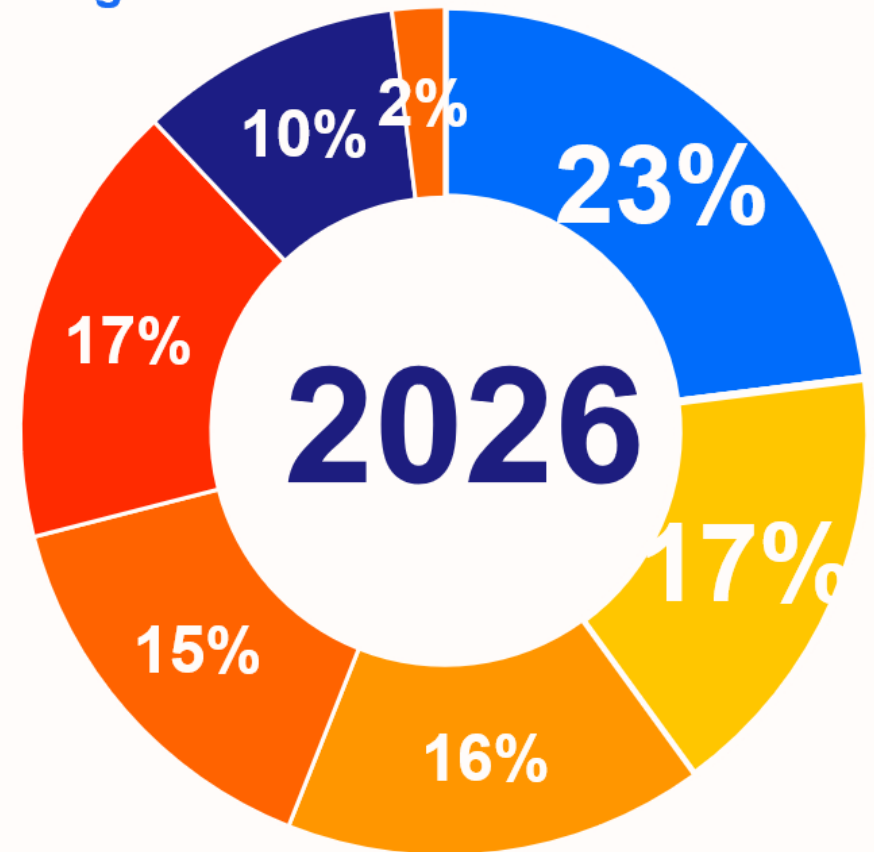
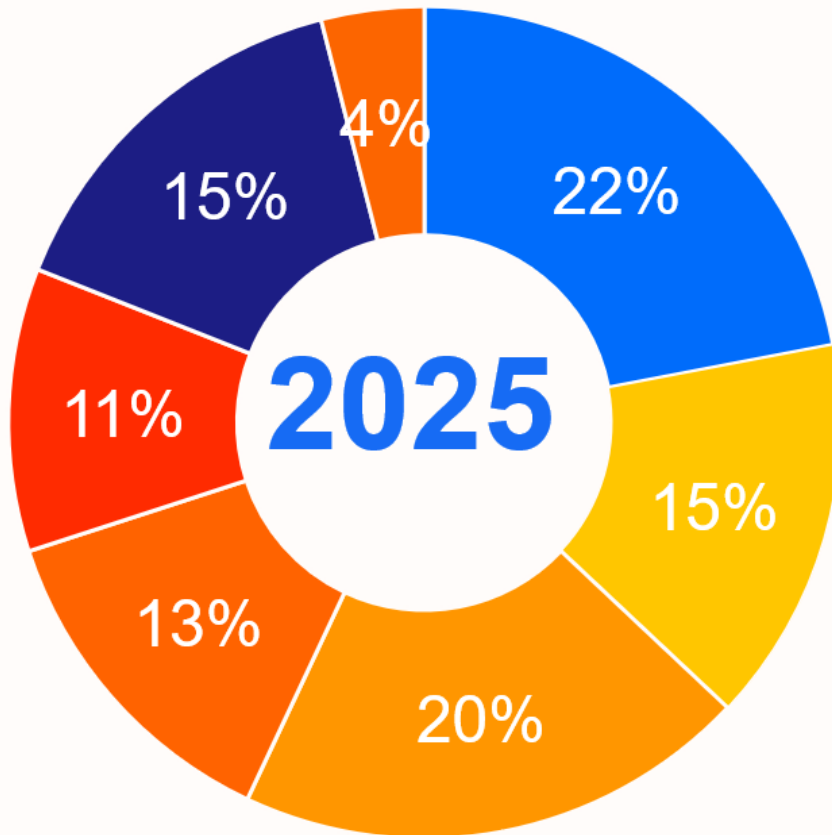
- 1 27.5% IT Security / Cloud
- 2 20.9% Hybrid IT and Cloud Management
- 3 18.7% Mobile App Development

*Rest of Latin America includes Central America, the Caribbean.



40% of the IT Budget Will Be Allocated to Infrastructure

% allocation of the annual IT budget



■ Hardware On-premises

■ Infrastructure as a Service

■ Software / Platform as a Service

■ IT Services

■ Other

■ Software On-premises

■ Telecom Services



How important is the role of data centers in infrastructure modernization for companies in 2025?

Q1. What have been your most important infrastructure modernization objectives over the past two years? WW

Top 4 Modernization Priorities

Automation

32%

Automating IT infrastructure is the #1 modernization priority.

Hybrid Cloud / Multicloud

27%

Enabling hybrid and multicloud environments is one of the biggest bets.

AI-Ready Infrastructure

24%

Deploying AI-ready infrastructure is gaining weight on the agenda.

Move to Colocation

24%

Repatriating and moving workloads to colocation is a growing priority.

Q2. What are the biggest challenges affecting the success of your infrastructure modernization strategy? WW

Main Modernization Challenges

- | | | | |
|---|--|--|-----|
| 1 | Lack of internal skills and tools | | 35% |
| 2 | Decentralized IT decisions | | 34% |
| 3 | Difficulty finding technology partners | | 32% |
| 4 | Compliance and regulation | | 29% |
| 5 | Too many legacy systems/apps | | 28% |
| 6 | Lack of executive support / alignment | | 27% |

Source: IDC Enterprise Infrastructure Pulse Survey — Storage and Converged Infrastructure, January 2026 (n = 870)



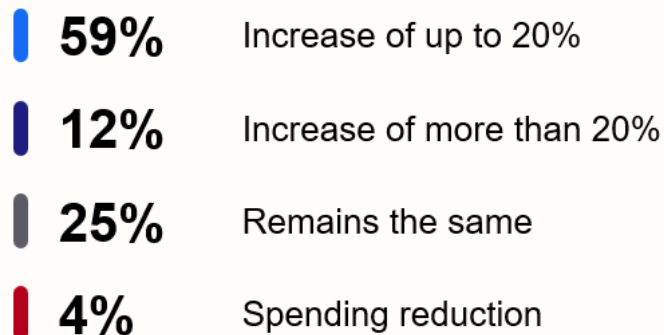


Enterprise Storage Investment Grows in 2026, Driven by AI

Will your organization's total planned spending on On Premises Storage be higher, lower, or the same in 2026 compared to 2025? WW

2026 Enterprise Storage Budget Plans

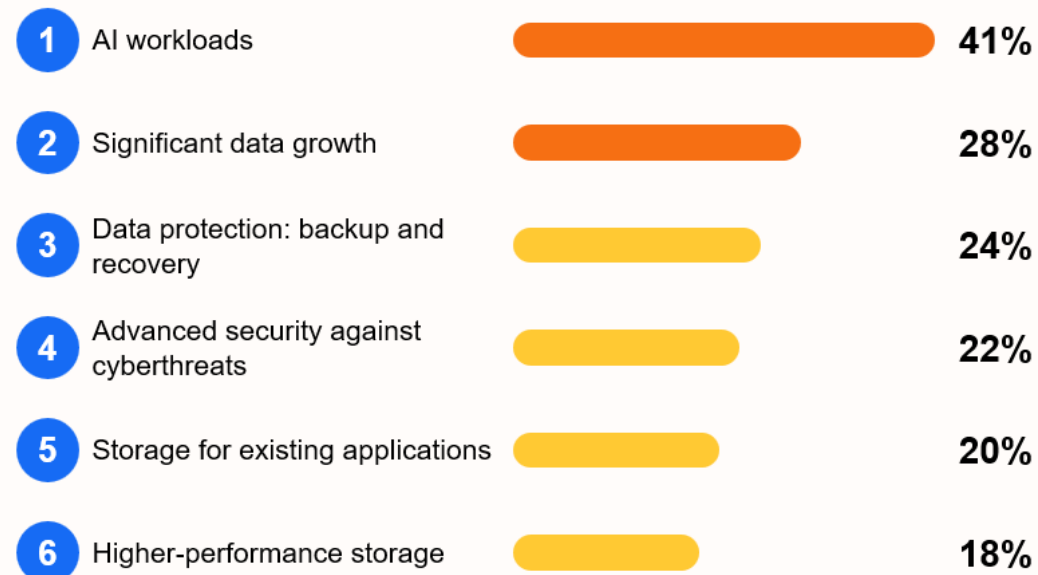
71% of organizations will increase their storage spending in 2026



Source: IDC Enterprise Infrastructure Pulse Storage Survey, February 2026, n = 870

Among organizations that expect to increase their spending on On Premises Storage infrastructure in 2026, what are the main drivers of the increase? WW

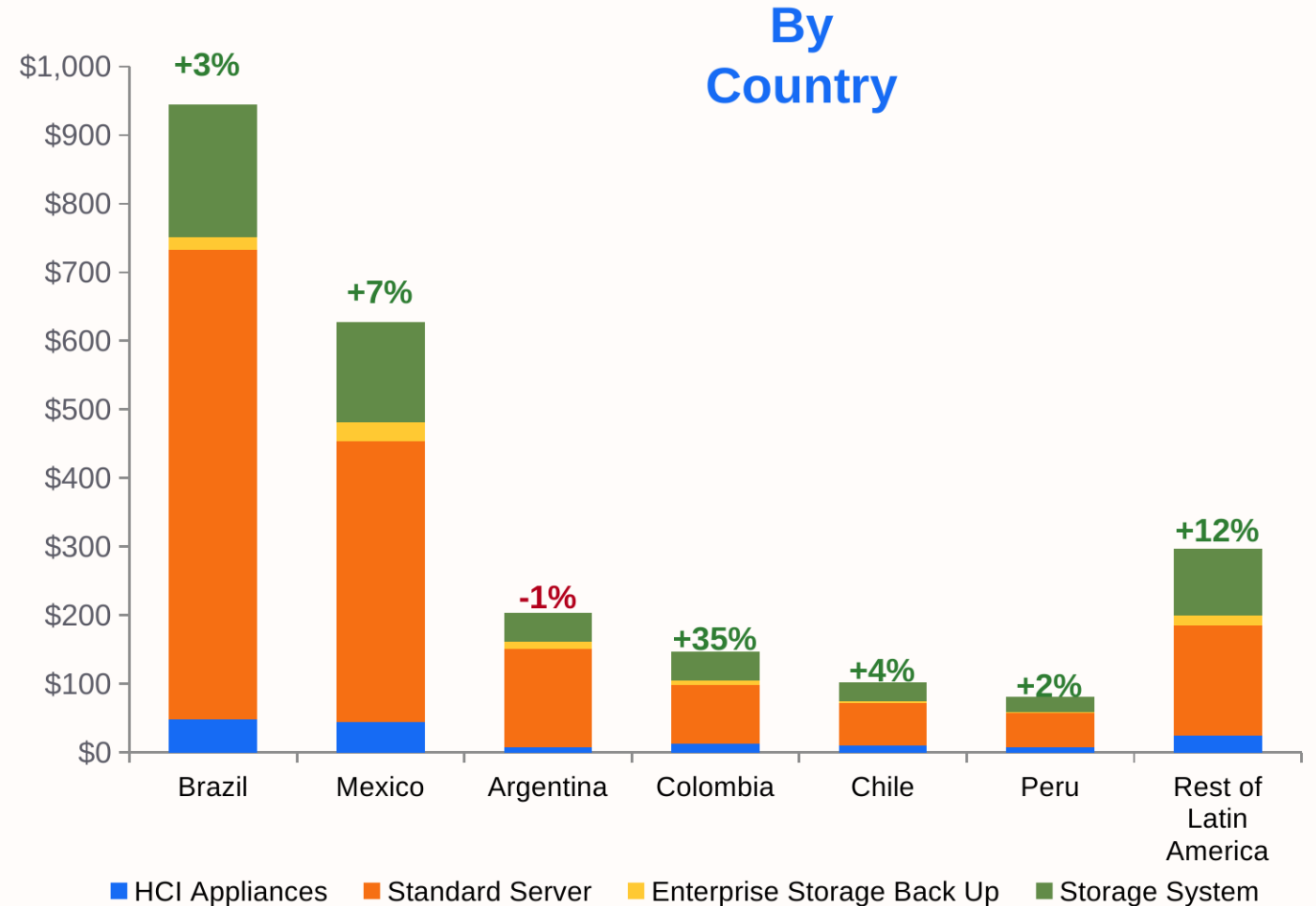
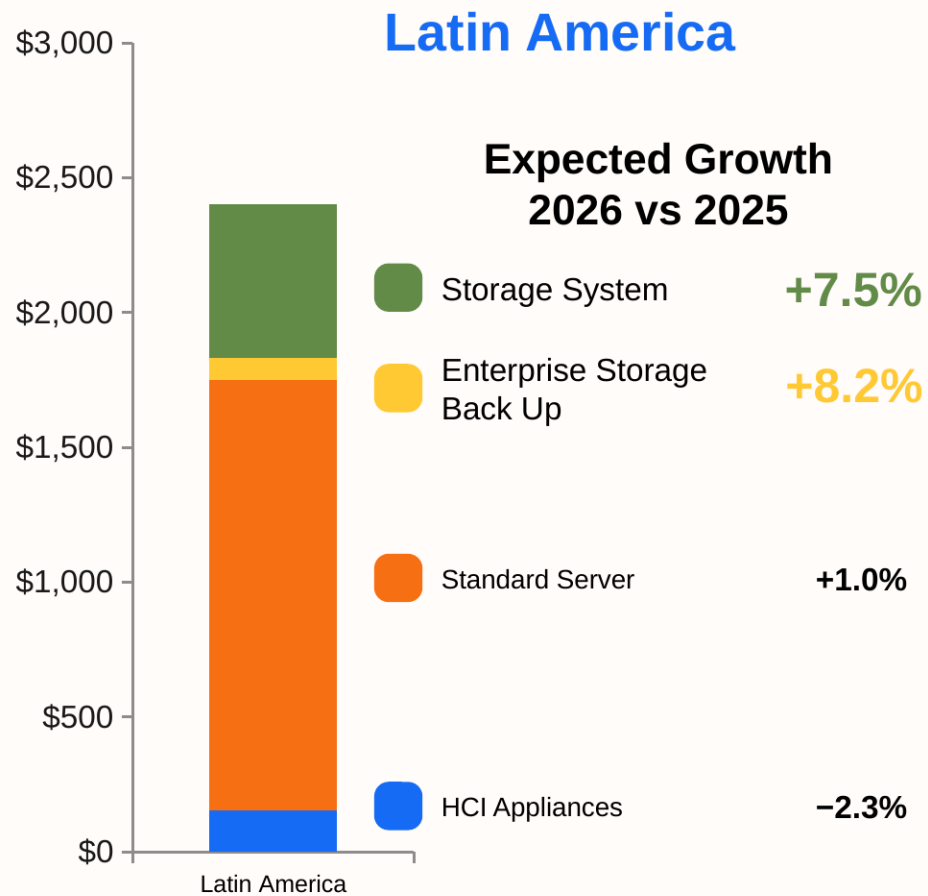
Main Drivers of Higher Spending



Source: IDC Enterprise Infrastructure Pulse Storage Survey, February 2026, n = 618



Investment in the Infrastructure Market in Latin America (US\$M) 2026



Data and Enterprise Storage:

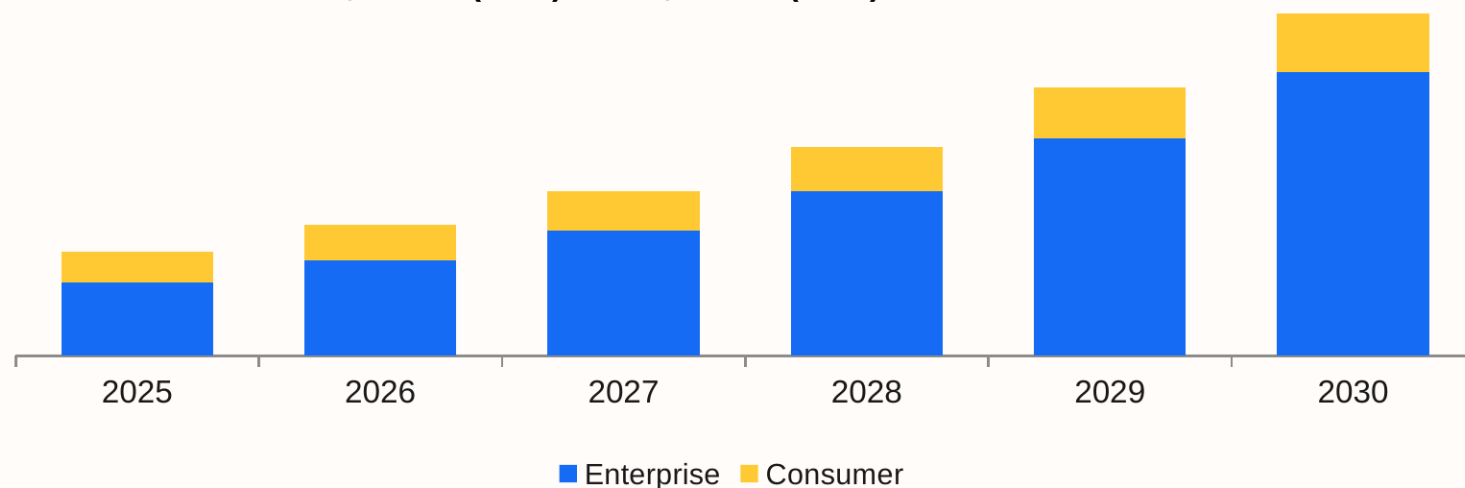
Security Challenges and Pricing Pressures to Keep Pace with Transformation.



Global Data Generation Multiplies on the Path to 2030

IDC Global DataSphere Forecast, 2025–2030, WW

From 218,433 EB (2025) to 718,484 EB (2030) — $\times 3.3$ · CAGR 26.9%



Data per Second — World

8.7 PB/s (2026) → 22.8 PB/s (2030)

2.6× more petabytes generated every second

Why Is Data Growing?

Enterprise Data Leads

Enterprise data grows 31.1% (>2× consumer data, 13.5%); its share rises from 70% to 83% by 2030. It drives IoT, cloud, and AI workloads.

AI Redefines the Mix

AI needs organized, quality data that, in turn, generates more data and relationships. AI-driven data is nearing 60% of the total.

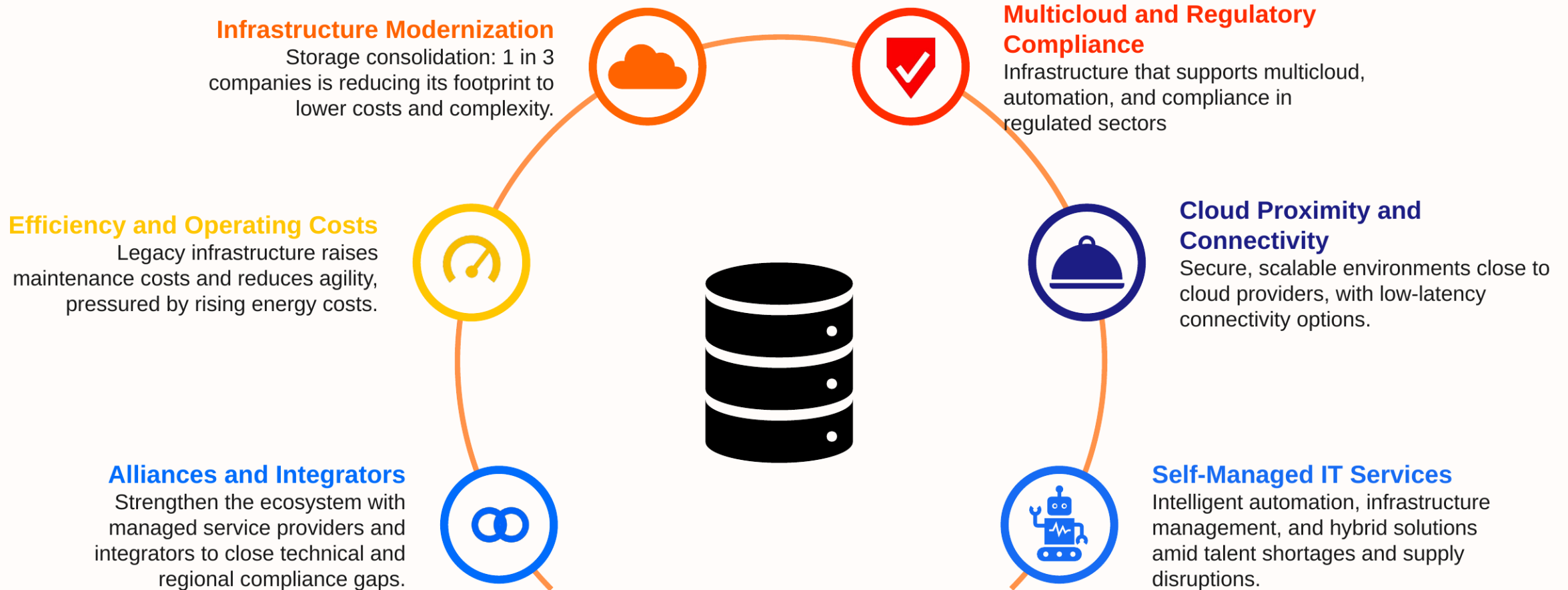
Data Is Concentrated in the Core

Processing and storage are consolidating in the Core (cloud and datacenters): cloud rises from 27% to 43% of the total by 2030, growing 38.9%.

1 Exabyte (EB) = 10^9 GB (1,000 million GB) · 1 Petabyte (PB) = 10^6 GB (1 million GB)



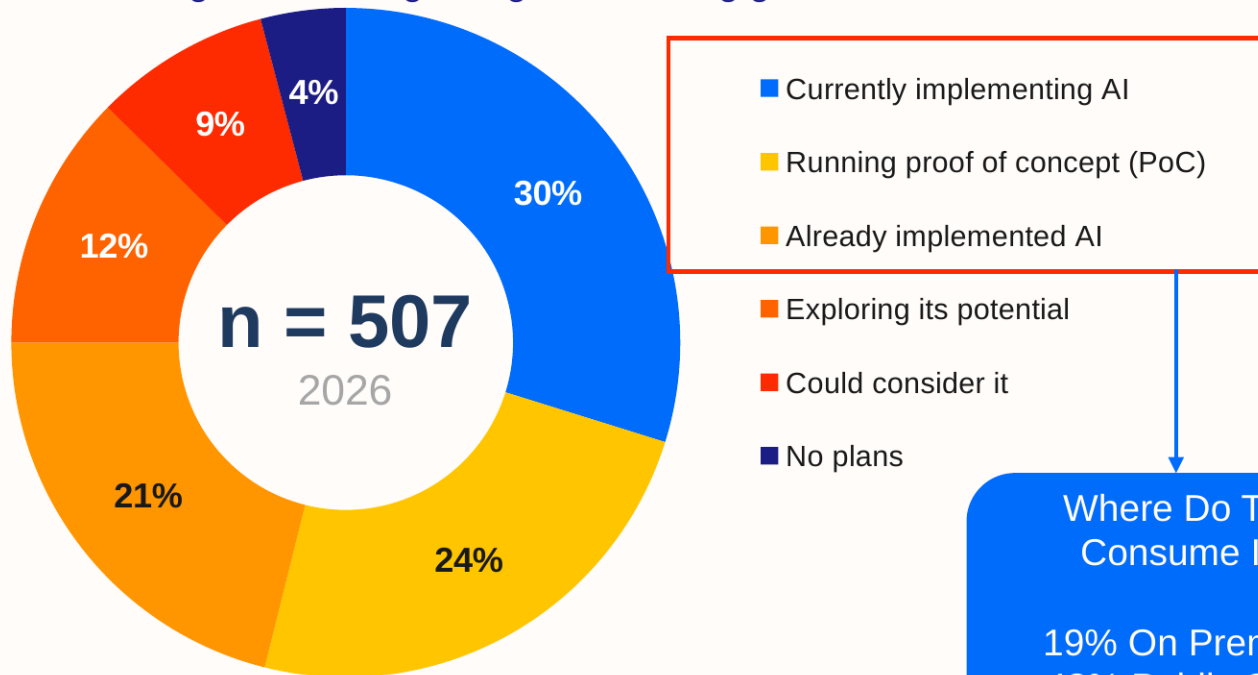
Themes in Storage Infrastructure Requirements 2026



AI Maturity and Tangible Benefits in Latin America

AI Adoption and Maturity Latin America

Q: Which of the following statements best applies to your organization regarding AI, including generative AI?

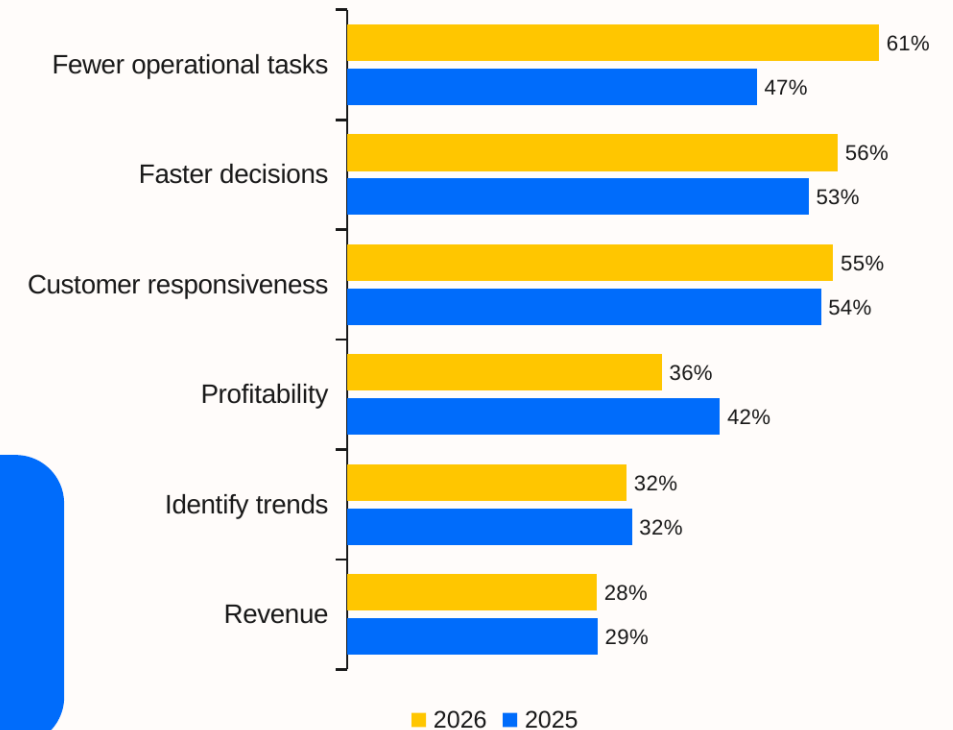


Where Do They
Consume It?*

19% On Premises
43% Public Cloud
38% Hybrid Cloud

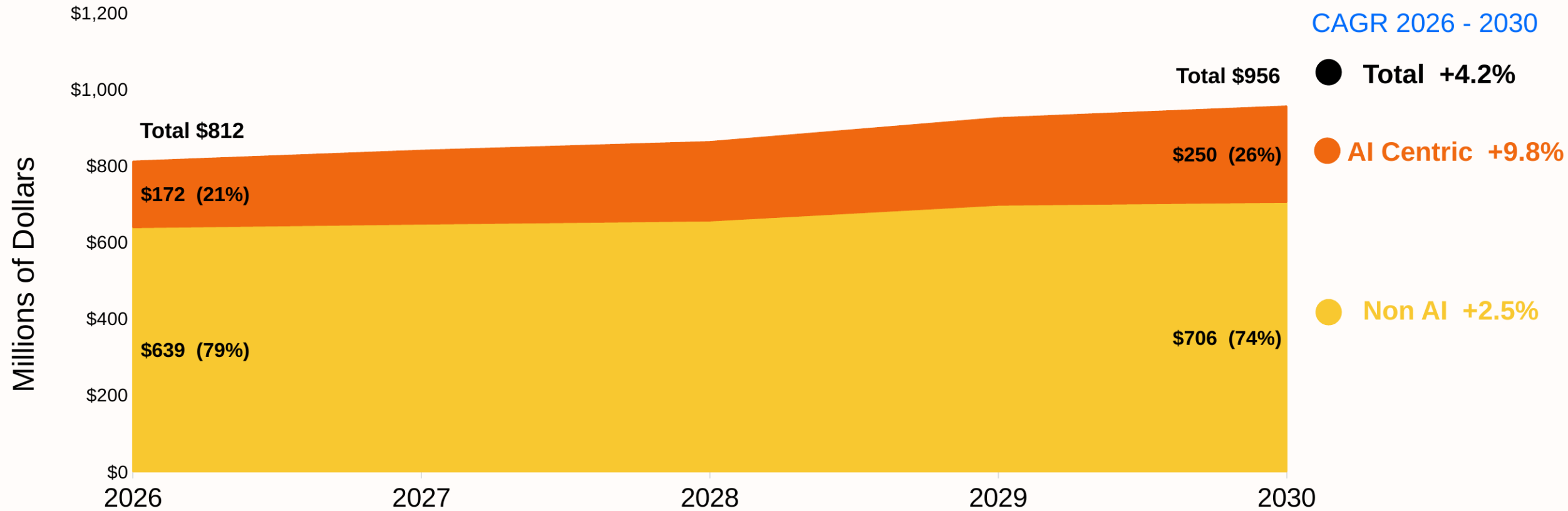
Areas Benefited by AI Latin America

Q: In which areas has your organization already obtained tangible benefits from using AI/generative AI? [up to 3]



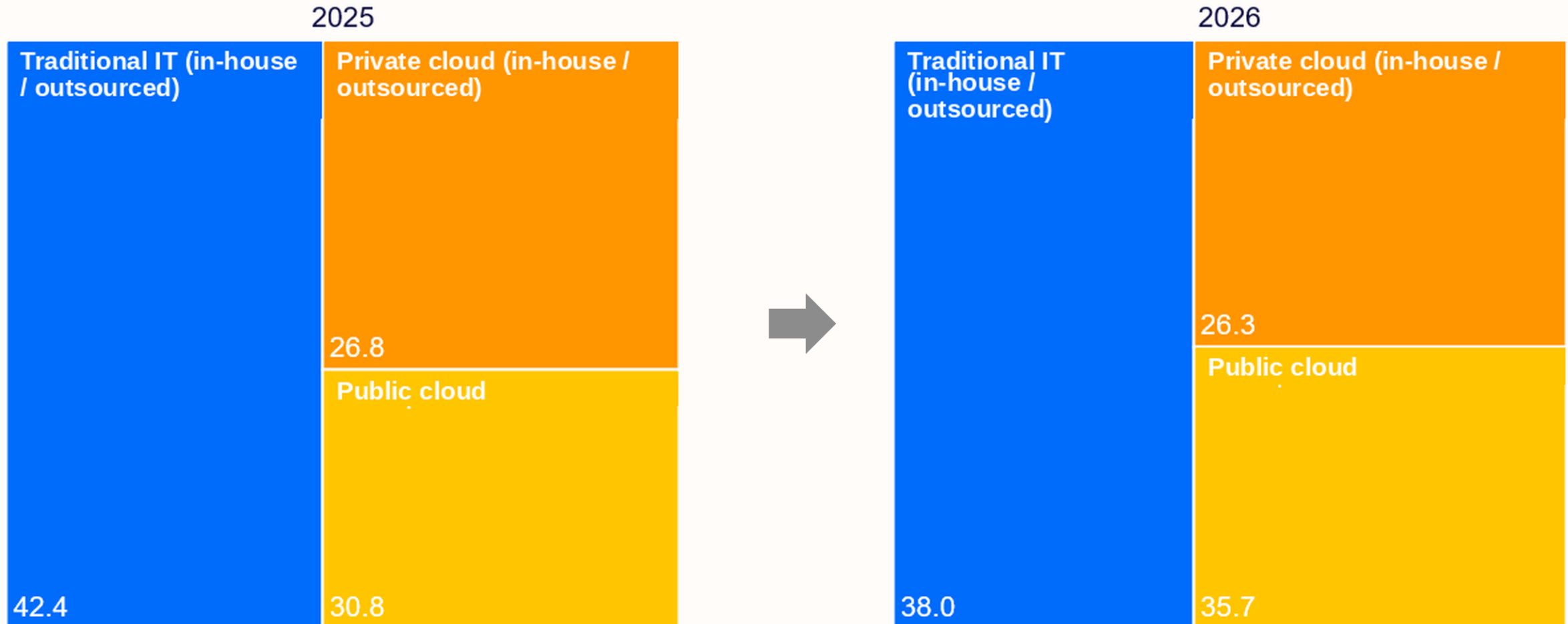
AI-Centric Storage Grows 2.5x Faster Than Traditional Enterprise Storage

Enterprise Storage Market Forecast by AI Type — Latin America (US\$M)



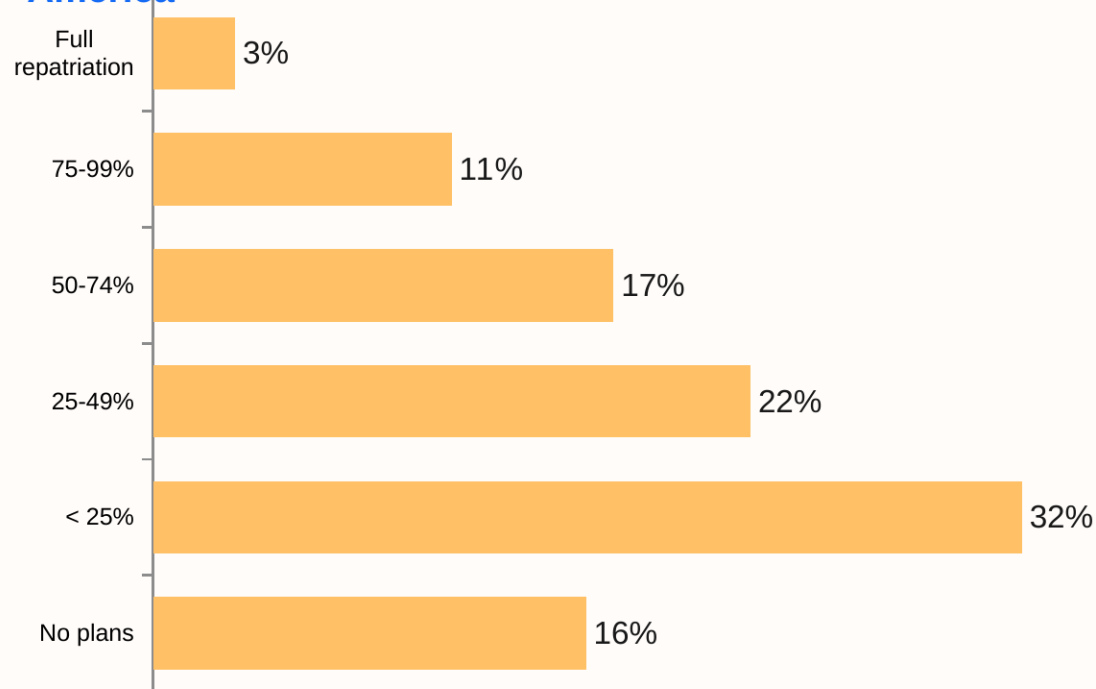
Hybrid IT Environments Remain the Standard

Percentage of total annual external IT budget allocated to acquisition/management models %



Storage Repatriation in Latin America Is Widespread, but Selective

Do You Expect to Repatriate Storage Resources from Public Cloud to Private/Non-Cloud in the Next 12 Months — Latin America



84%

plan to repatriate at least one storage workload from public cloud to on-premises; only 16% have no plans.

Why Are They Repatriating? Main Drivers (by weight)

- 1 Application performance / latency**
Driver #1 (36%),
- 2 AI integration and sensitive data**
By isolating the AI context and maintaining control over data security
- 3 Security and compliance**
Greater oversight of proper data use and regulatory compliance
- 4 Data sovereignty and regulation**
A structural, not cyclical, driver.



Security Breach Costs Drive Prioritization in the IT Budget

The Cybersecurity Landscape in 2025

\$10.5T USD

Global cost of cybercrime in 2025 — equivalent to the world's 3rd-largest economy

IDC Latin America Security Overview 2025

90%

Of organizations in Latin America were attacked by malware, including ransomware, in 2025

IDC Latin America Security, 2025

200+ days

Average time to detect a breach without an integrated platform

IDC Security Platform Analysis, 2025

45%

Of alerts go uninvestigated — operational fatigue with 45+ tools running in parallel

IDC SASE Buyer Insights Survey, 2025

Anatomy of a Breach's Cost Latin America

US\$ 391,015

Average ransom payment (ransomware) at large companies

+

Direct costs — Response, business losses, and legal

+

External expenses — Victim compensation

+

Indirect costs — Marketing, cyber insurance, and new technologies



US\$ 2.8 M

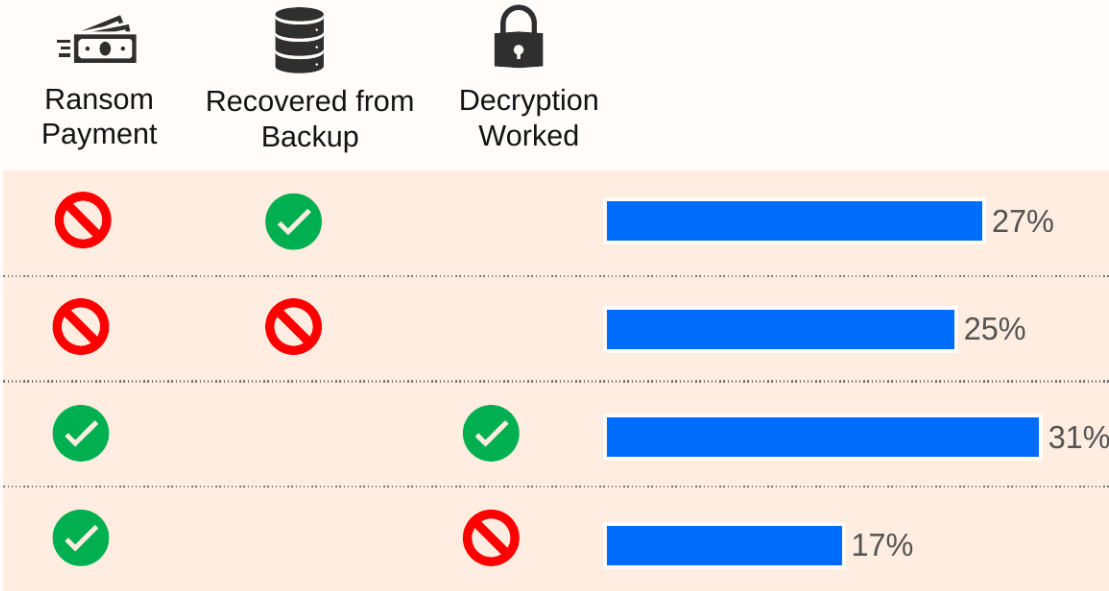
Average total cost per breach at large companies
Includes all costs above



Data Protection Is Critical to Business Resilience

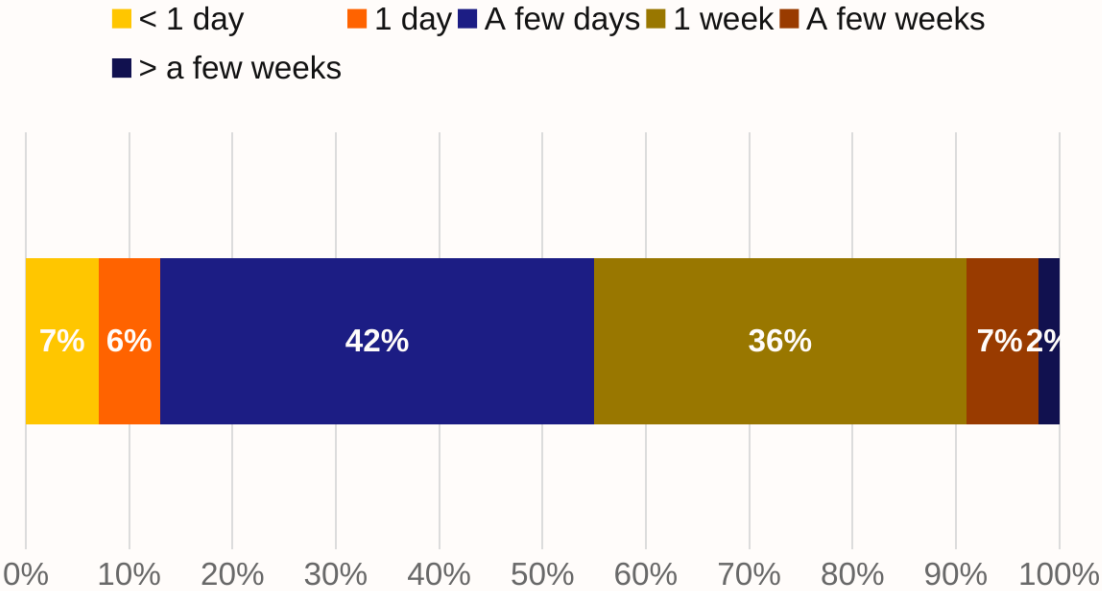
Actions After a Ransomware Attack Latin America

Q: For your most recent ransomware incident that blocked access to systems or data, which of the following occurred?



Recovery Time from a Ransomware Attack Latin America

Q: For your most recent ransomware incident that blocked access to systems or data, how long did the breach last?



Pricing, Talent, and Data Security: Key Risks for IT Infrastructure Investment

Pricing

Inflation is the biggest concern; it hits smaller, price-sensitive organizations hardest.

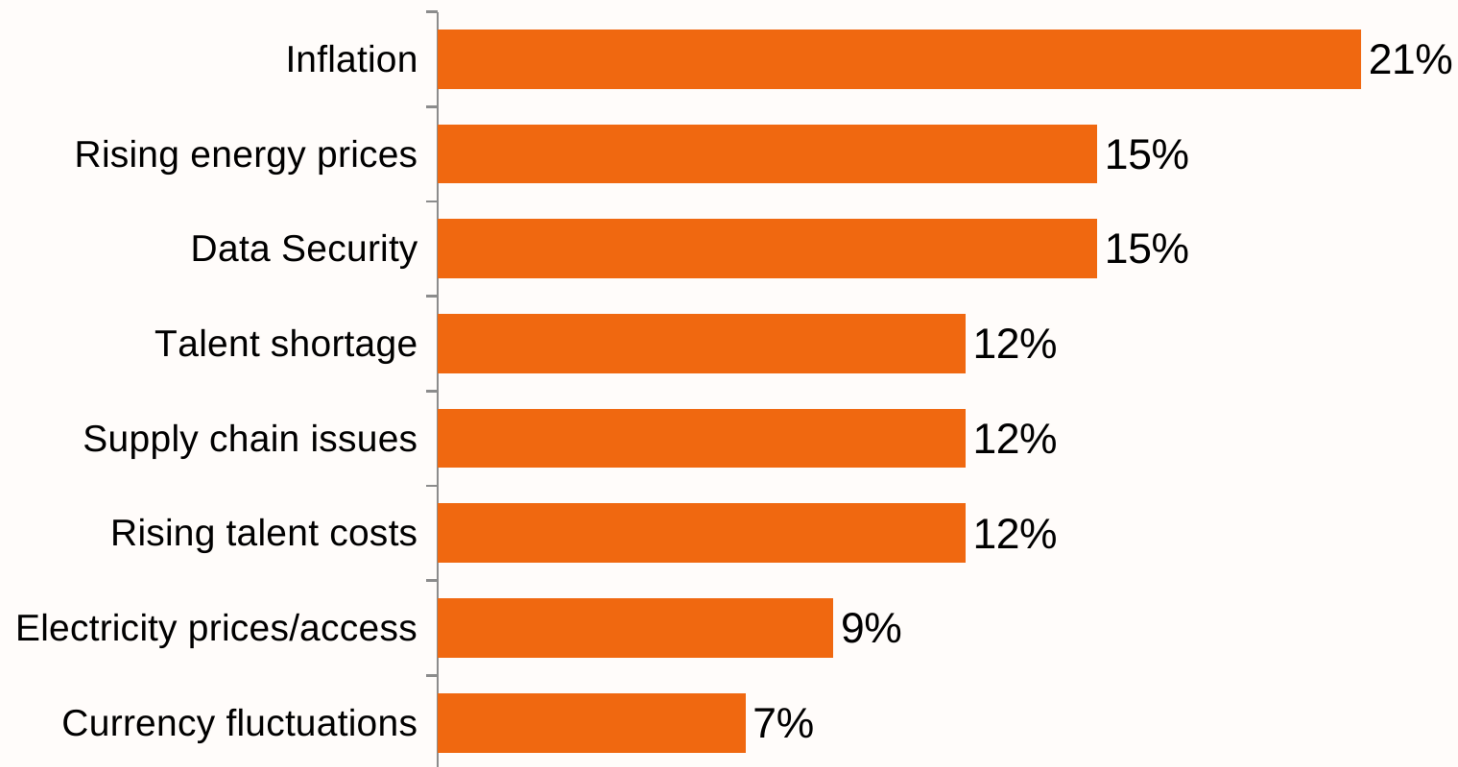
Talent (skills)

Talent shortage remains a concern, but it has been easing thanks to greater channel and services participation.

Data Security

Attacks causing infrastructure outages and operations remain among the top 5 concerns (15%).

Which business risks do you expect to be the most disruptive to your IT infrastructure purchasing over the next 12 months?, WW



Source: IDC Enterprise Infrastructure Pulse Survey — Storage and Converged Infrastructure, January 2026 (n = 870)



Structural Capacity Reallocation in the Memory Industry Raises Enterprise Storage Prices

"This is a strategic reallocation of global manufacturing capacity. We expect supply constraints to persist through 2027."

+94%

Global quarterly change in enterprise SSD \$/GB, 1Q26

3 Reasons Behind the Increase

AI Datacenter Pressure

High-capacity memory is prioritized for AI; traditional storage refreshes take a back seat.

Supply Pressure

Suppliers prioritize enterprise and cloud capacity over consumer products, raising prices.

Costs That Add Up

Logistics and inflation driven by global raw-material constraints amplify the total impact.

How the Industry Is Responding

15–20%

Price increases across most vendors globally

50%

Inventory buildup above normal levels

Multi-year supply agreements

Standard practice to secure future capacity

↓ Margin

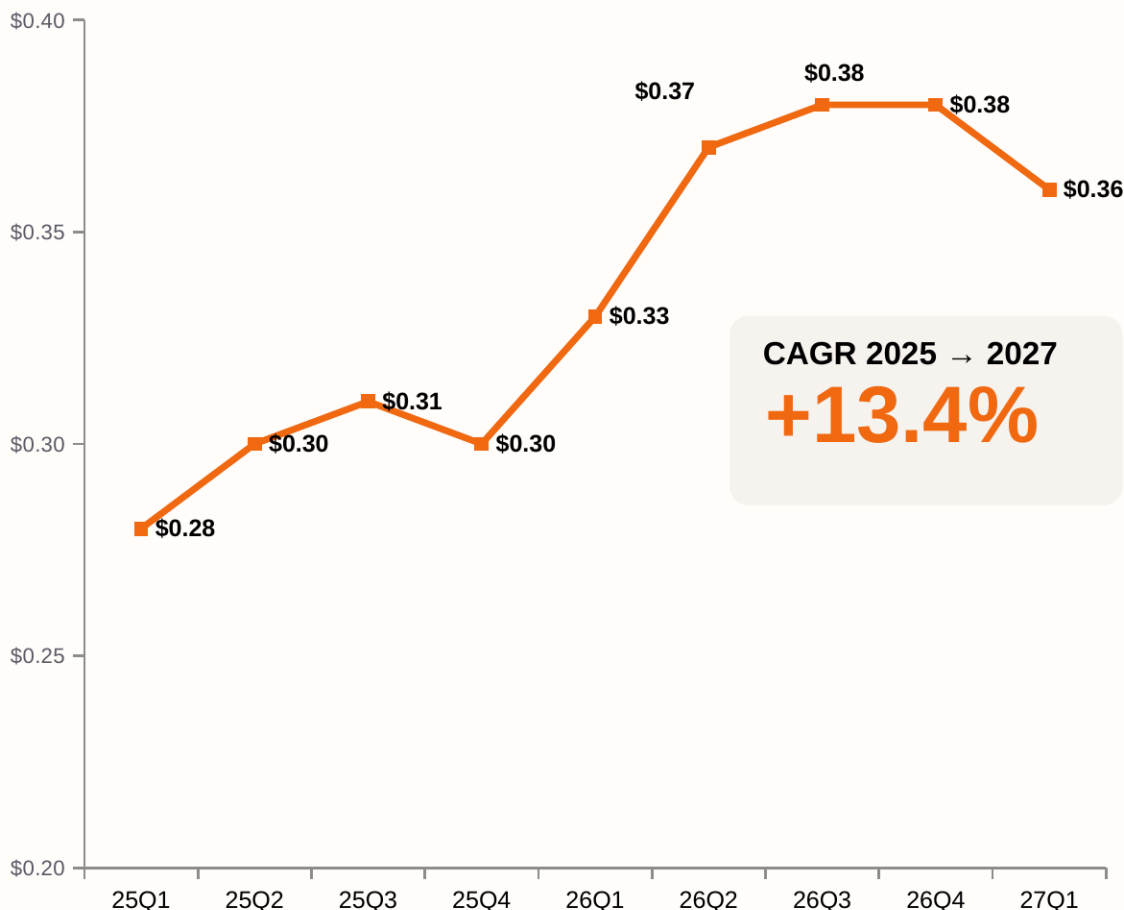
Margin reduction reported by both manufacturers and the channel

Source: IDC, Global Memory and Fab Shortage Crisis: Implications and Mitigation Strategies, June 2026; Worldwide Quarterly SSD Trends and Four-Quarter Forecast; IDC Enterprise Infrastructure Pulse Survey, June 2026



Storage Prices (\$/GB) and Their Impact on the Channel

Storage Price — \$/GB (Storage System)



Implications for the Channel



Compressed Margin Despite Higher Ticket Size

The manufacturer captures the value of flash/AI in its "vendor revenue"; the partner resells at a higher price without growing its margin. → Negotiate the "street price" vs. what's locked into firmware/software.



From Product to Consumption (SHaaS)

Revenue is recognized at initial shipment, not as recurring flow; the channel shifts from selling transactions to managing consumption. → Renegotiate timing and margin basis before signing.



Marketplaces and Co-Sell Offset the Pressure

In LatAm, 22.8% of 2025 growth came from marketplaces (Microsoft, AWS, IBM, Google); co-sell accounted for 52.3%. → Be present in at least one dominant marketplace.



Barriers to Diversification

Limited visibility into early purchase intent (56.1%) and lack of internal resources (52%). → Assign a dedicated owner for co-sell/marketplace.



The Partner's Key Position:

Ally in Business Transformation and
Modernization Opportunities in
Platform Storage





How the Channel Should Respond to Storage Modernization Challenges

“The channel stops selling boxes: whoever turns modernization challenges into business results for the customer wins.”



The Customer's Challenges

AI-Ready Platforms

High-performance arrays (all-flash, low latency) for AI and analytics workloads.

Hybrid Cloud and Repatriation

84% plan to repatriate some storage; a selective shift between cloud and on-premises.

Structural Price Increase

The \$/GB rises ~13% annually, driven by flash and AI; it's not a one-time adjustment.

Security and Sovereignty

90% of organizations were attacked; the cost per breach reaches US\$2.8M.



How the Channel Should Respond

Sell the Lifecycle

AI-ready services + data logistics and FinOps, not boxes.

Lead with the Business

Efficiency, agility, and revenue; not the technical migration.

Value per GB

Reframe the price; offer flexible consumption (as-a-service).

Hybrid and Sovereignty

Design with compliance from day one, in every proposal.

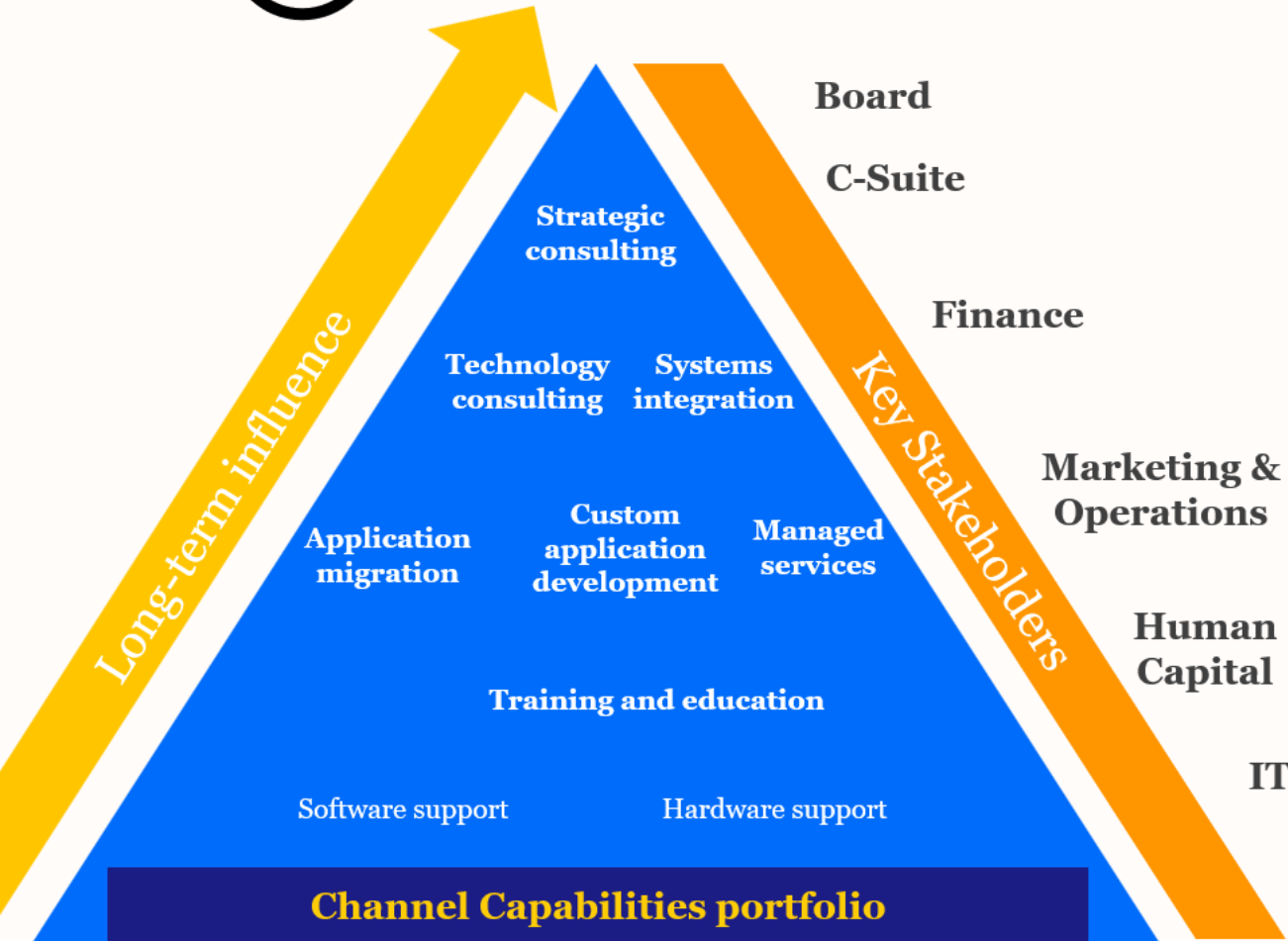
Take the conversation to: CIO/CTO · CFO and Procurement · Security and data governance — with the business case, not just the technical specification.



Become the Channel of the future: Next Skills and Business Model



Channel Skills



Channel Business Model

Past



Present



Future

Technology

Traditional / On-Prem

Next-Gen

Digital Products & Services

Focus

Broad

Specialized

Digital Innovation

Activities

Resale Services

Services Creating

Co-creating Ecosystem solutions

Customer

IT

Business and IT

C-Suite

Competition

Traditional

Non-Traditional

Cooperative & Industrial

Alliances

Do it Ourselves

Partner Collaboration

Ecosystems

Time horizon

Short-term

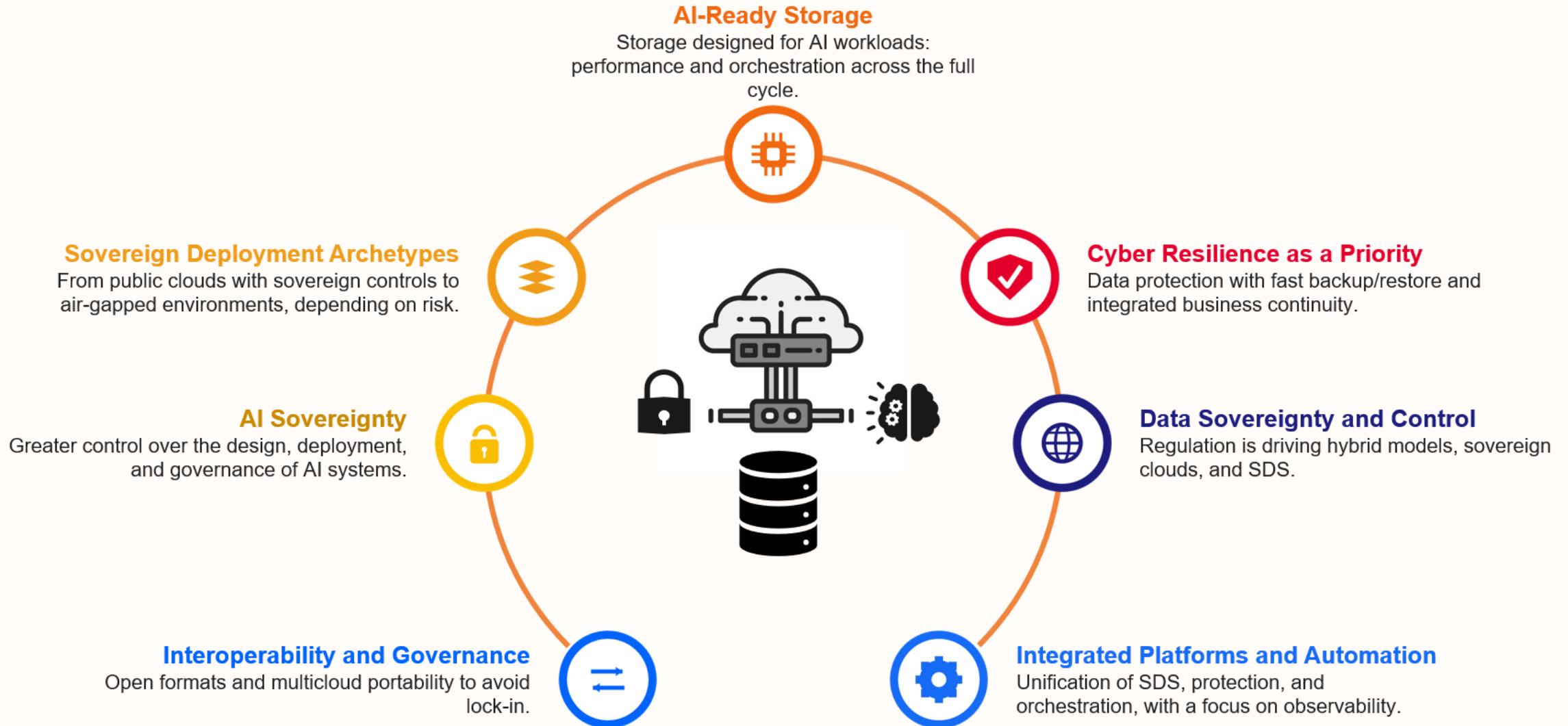
Long-term

Continuous Transformation

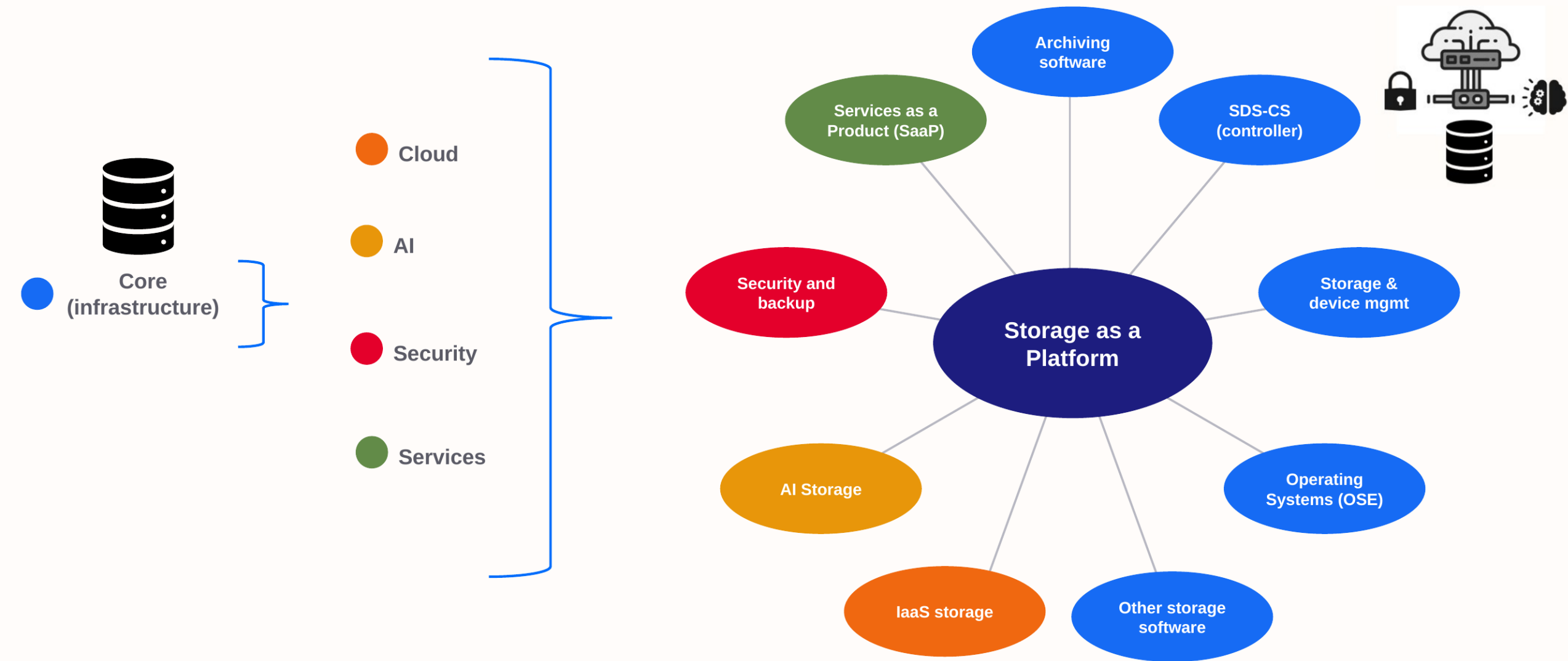
Note: "Services" comprises business services, IT services, connectivity services, and other services and materials.



How a Complete Platform Storage Solution Comes Together



Storage-as-a-Platform Market Portfolio



Opportunities Grow 10x in Platform Storage. Partners Become Strategic Business Allies.

Forecast: Traditional Enterprise Storage + Software and Services in Storage as a Platform (US\$M)
Latin America 2025 – 2027*



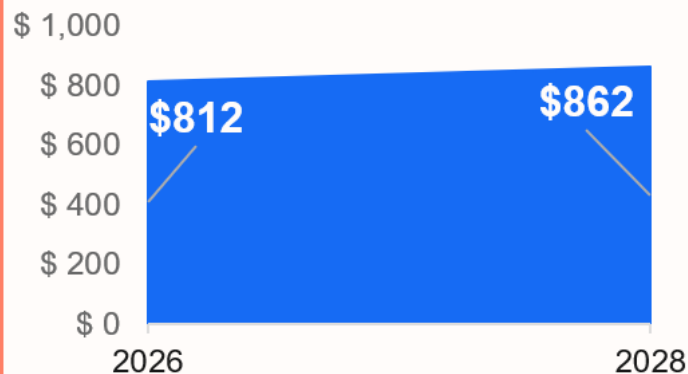
Storage as a Platform

US\$ Millions (constant value)



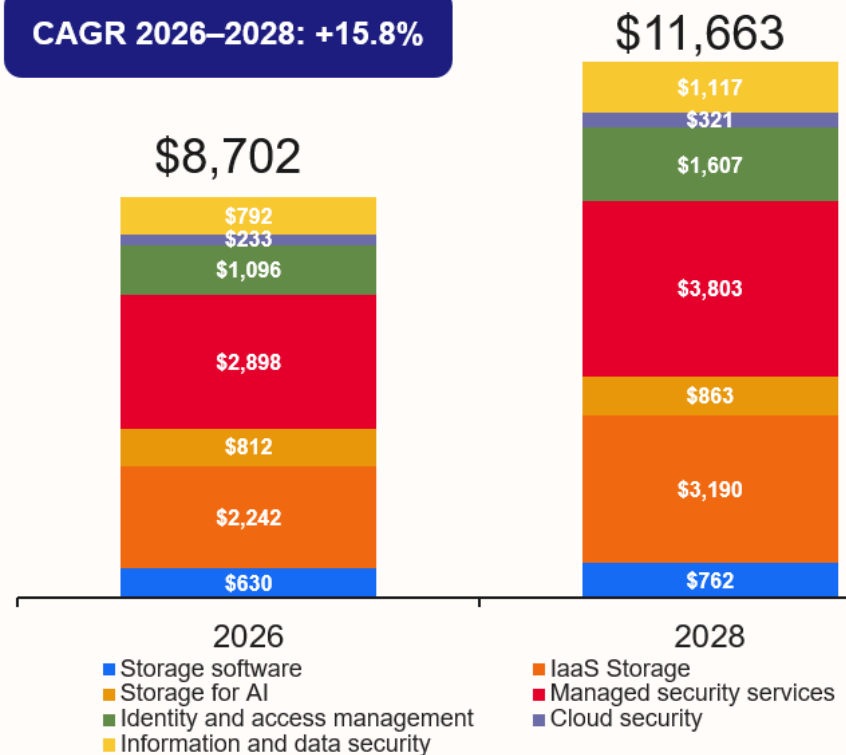
Traditional storage
(HW only)

CAGR 2026–2028: +4.7%



10x

CAGR 2026–2028: +15.8%



Recommendations for Partners



Relationship Is Key to Building Loyalty

Partners must strengthen the customer relationship through more agile processes and better support (training, financial incentives, and technical assistance).

Become a strategic business partner, help define the customer's intelligence roadmap, and lay the foundation for a competitive long-term business model.



Accelerate Services- and AI-Driven Transformation

AI services are seen as a major opportunity; customers prioritize profitability and ROI.

Enable customers to invest in AI-powered service delivery and recurring revenue models, supported by vendor programs that provide AI resources and co-sell opportunities.

AI-driven services expand cross-selling opportunities and improve efficiency, aligning with profitability and sustainability goals.



Industry Solutions and Customer Success

26.4% of revenue comes from industry-specific solutions; customer success and co-selling are the main success factors.

Develop vertical-focused offerings and collaborate with vendors on co-sell strategies to differentiate and grow.

Industry specialization and joint go-to-market efforts improve competitive positioning and drive higher-value projects.





Oscar García
ogarcia@idc.com



[linkedin.com/in/oscar-garcía](https://www.linkedin.com/in/oscar-garcía)