



Engage, Innovate, Excel in the Digital Economy

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Transitioning to the Digital Economy



**DHL, Amazon and Audi
- transforming logistics**



**Airbus A380 – the flying
datacenter**



**NHS UK revitalizing
patient care**



**Kids play with
physical OR digital toys**



**Reshaping traditional
banking services**

Digital Transformation Moves to the Center of Corporate Strategy



By the End of 2017, Two-Thirds of the CEOs of FT Enterprises in Europe Will Have Digital Transformation at the Center of Their Corporate Strategy

3rd Platform Drives Transformation



CLOUD



BIG DATA/
ANALYTICS



SOCIAL
BUSINESS

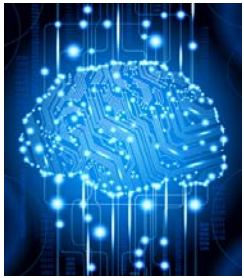


MOBILITY

By 2017, Over 50% of Organizations' IT Spending Will Be for 3rd Platform Technologies, Solutions, and Services, Rising to Over 60% by 2020

By 2018, at Least Half of IT Spending Will Be Cloud Based, Reaching 60% of All IT Infrastructure and 60-70% of Software, Services, and Technology Spending by 2020

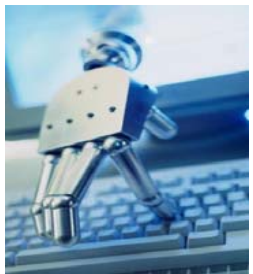
Innovation Accelerators



Cognitive Systems



Internet of Things



Pervasive Robotics



Wearables



3D Printing



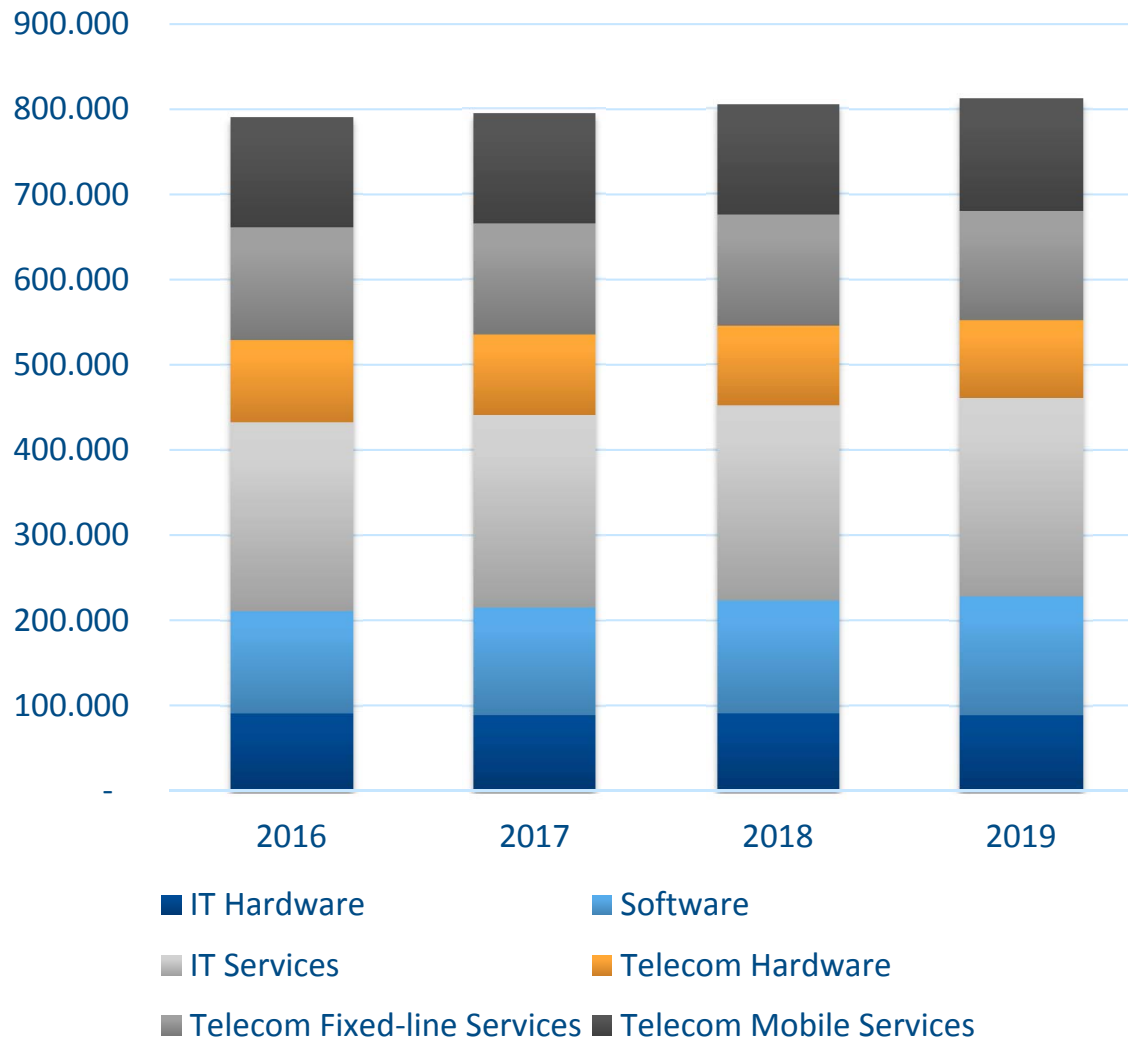
Augmented/Virtual Reality



Source: IDC

ICT Spending in Transition in Europe

West European ICT Market, \$US Mn

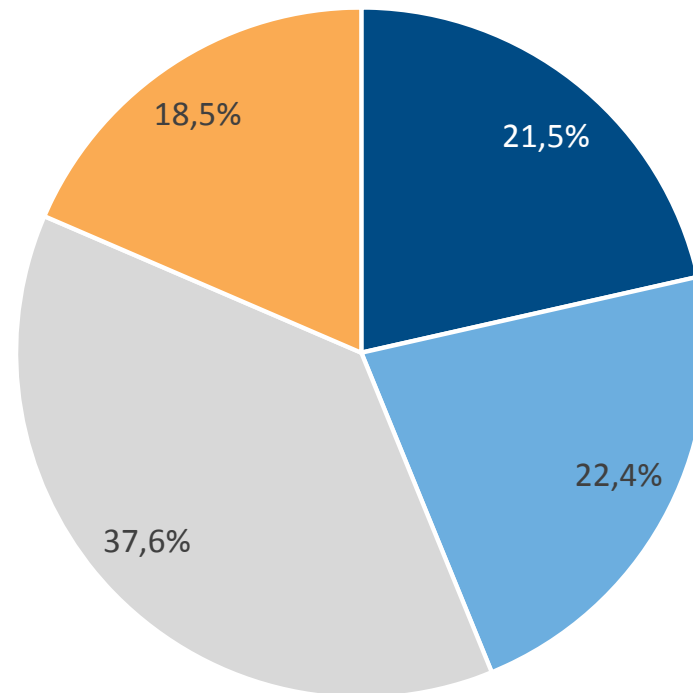


Source: IDC WW Blackbook, Q4 2015

- Traditional ICT investment is declining – 3rd platform segments up double digits – mood improving!
- Public Cloud Services segment expanding by 20%+ annually; 44% larger in 2019 in terms of spending
 - By 2018, 40% of European enterprises' IT infrastructure and software investments will be cloud based, pushing 50% in 2020
- Pockets of mobility solutions market growth
- Big Data Analytics segment growing sharply
- Security remains top priority

Growing Focus in Europe on Growth and Innovation

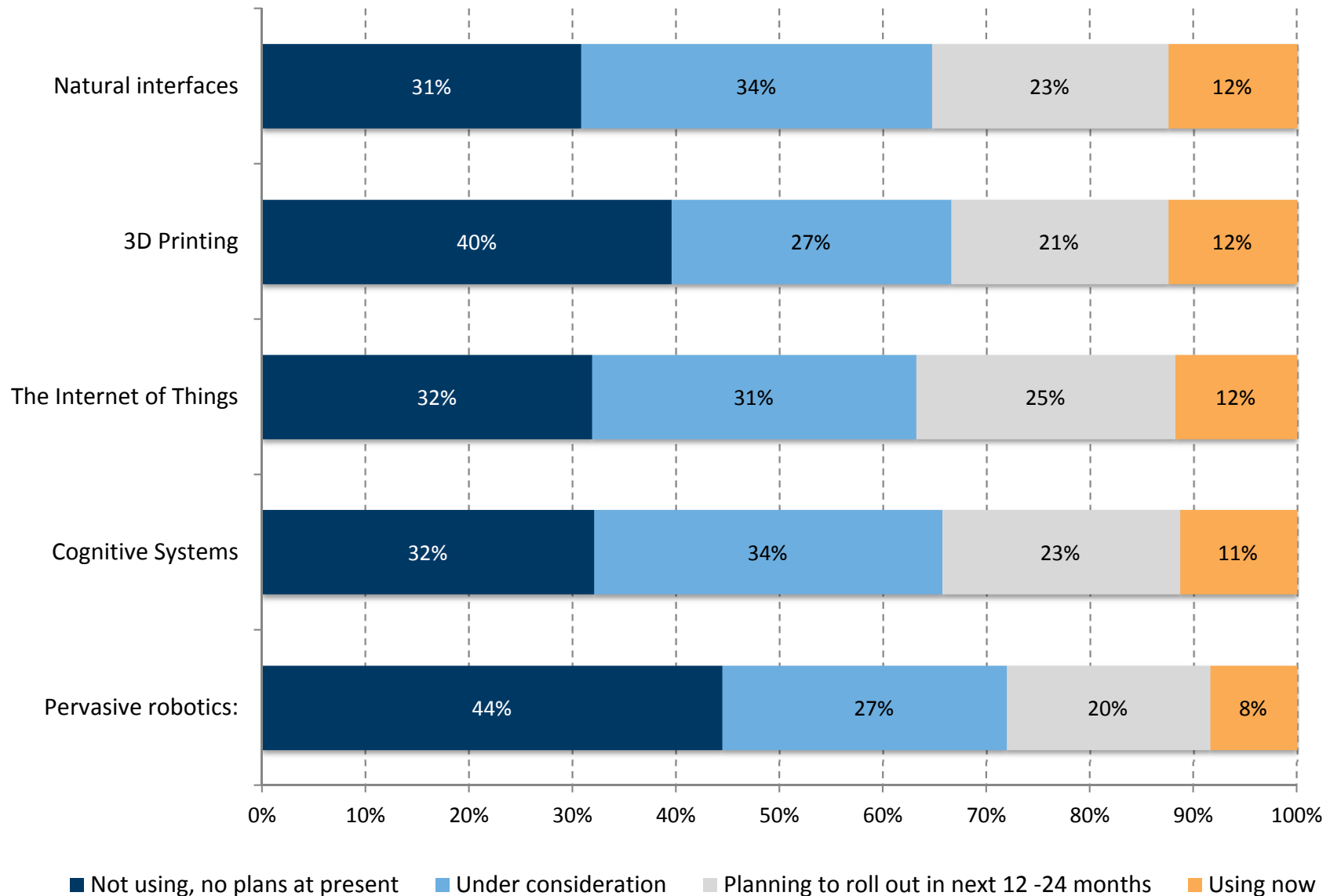
B5. In 2016, what percentage of your IT budget will be allocated to.



■ Growth ■ Innovation ■ Maintain/Run ■ Compliance to regulatory requirements

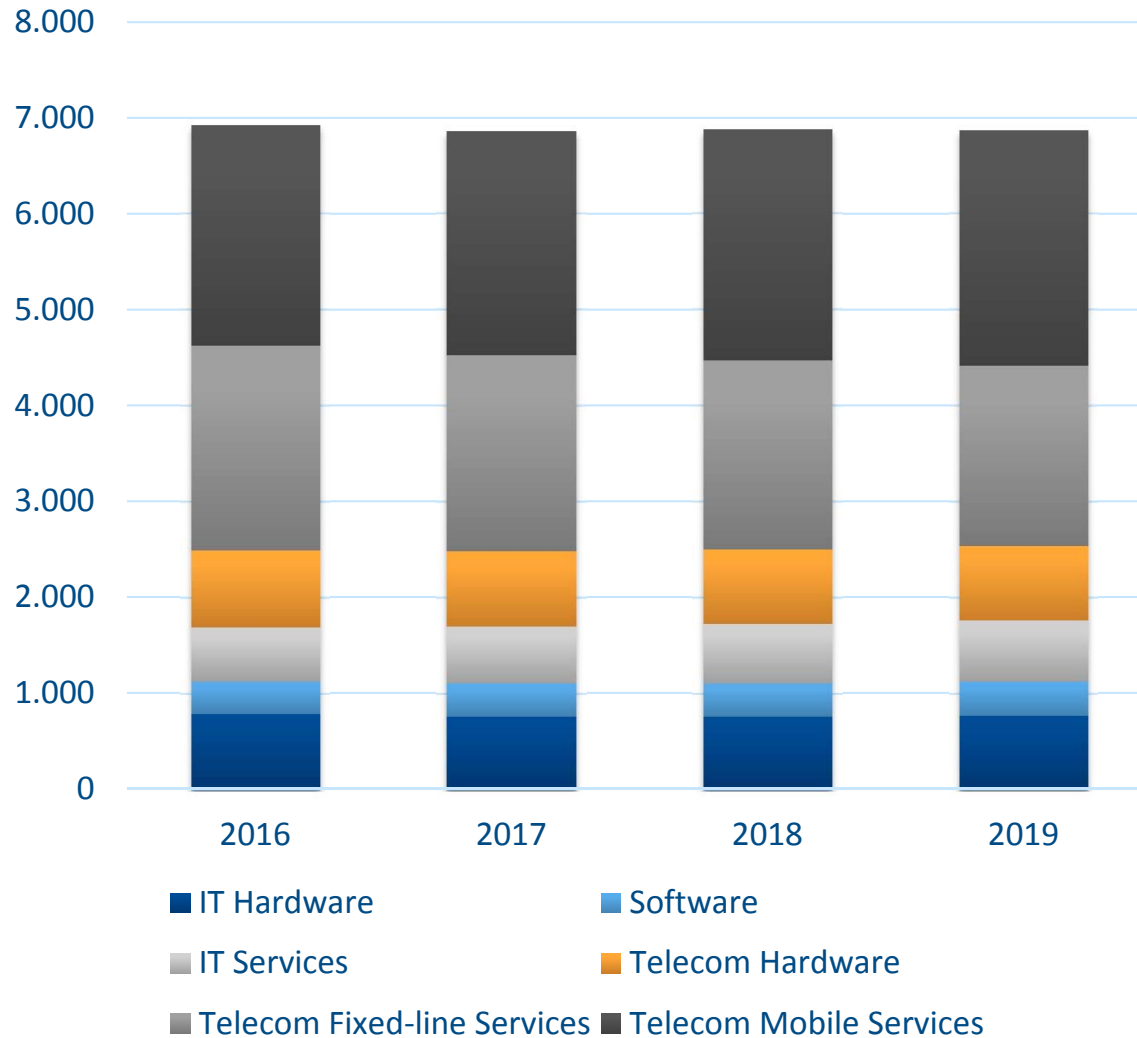
Innovation Accelerators in Europe

Q18. Which of the following Innovation Accelerators are on your Business/IT radar as tools to improve your organizations business processes and performance?



ICT Market in Greece: Stabilizing, Transitioning

Greece ICT Market, \$US Mn



Source: IDC WW Blackbook, Q4 2015

- Further contraction in 2016 but ICT market stabilizing and changing
 - General expectation of lower budgets – cost management, control, skills and infrastructure optimization remain key challenges
 - Security, consolidation (virtualization, automation), mobility, cloud are top IT priorities
- Enduring pockets of growth: software, IT services, data services (fixed, mobile), mobile devices
- Security, business intelligence, IoT are software spending priorities; SaaS gains momentum
- IT Services – application development, Cloud & operations management stand out

Digital Transformation is Multifaceted and Accelerated



Digital Transformation is the approach by which enterprises drive changes in their business models and ecosystems by leveraging digital competencies.

Summary – 2016 and Beyond

- We are experiencing a once in a generation transformation
 - Scale, accelerated transformation and ongoing disruption are the norm - most industries will be forever changed
- Every organization must become a technology/digital company in the new marketplace
 - Re-center your strategic focus around DX and 3rd platform transformational technologies
- Digital transformation requires changes in business culture, enterprise architecture and leadership strategy with a strong focus on innovation, integration and incorporation
 - Reconsider your strategies for talent management, vendor and partnering, IT services delivery, innovation, enterprise architecture
- The ICT market in Greece will be fundamentally transformed