The Cloud, Mobility… and *Beyond*

Positioning for the 3rd Wave of ICT Industry Growth

Vangelis Karanikas

Research Analyst

Greece, Cyprus & Malta

IDC Greece

Cisco Connect

Athens, 23 April 2013

Copyright IDC. Reproduction is forbidden unless authorized. All rights reserved.

IDC Overview

- IDC is the premier **independent global market intelligence, events, and advisory firm for information technology, telecommunications, and consumer technology markets (ICT)**
- More than 1,000 IDC analysts, including in-house statisticians and economists, provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries
- IDC has been delivering IT intelligence, industry analysis, market data, and strategic guidance since its 1964 founding by Patrick McGovern
- Our multilingual, multicultural workforce surveys over 360,000 technology users and decision makers annually, delivering unrivaled coverage
- IDC is a subsidiary of IDG, the world's leading technology media, events and research company

© IDC

IDC's Worldwide Geographic Coverage
EMEA - Europe, Middle East, Africa (73)

IDC
Analyze the Future

Europe

Austria
Belgium
Denmark
Finland
France
Germany
Greece
Ireland
Italy
Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
United Kingdom

Albania
Azerbaijan
Belarus
Bosnia and Herzegovina

Bulgaria
Croatia
Cyprus
Czech Republic
Estonia
FYROM
Georgia
Hungary
Kazakhstan
Kosovo
Kyrgyzstan
Latvia
Lithuania
Malta
Moldova
Montenegro
Poland
Romania
Russia
Serbia
Slovakia
Slovenia
Tajikistan
Turkmenistan
Ukraine
Uzbekistan

Middle East/Africa

Turkey
UAE
Saudi Arabia
Kuwait
Qatar
Oman
Bahrain
Lebanon
Syria
Jordan
Israel
Rest of Middle East

Egypt
Morocco
Algeria
Tunisia
Libya
Ghana
Kenya
Uganda
Nigeria
Namibia
Ethiopia
Tanzania
Botswana
South Africa
Rest of Africa

For more information about IDC in CEMA region please visit:
www.idc-cema.com

IDC's Product Breadth

Comprehensive, Diverse, and Specialized Coverage

IDC Analyze the Future

Worldwide … Regional … Local

Market Research
- CIS
- Trackers
- Reports
- Honorarium
- Umbrella

Custom Research
- Custom Market Sizing
- Ad Hoc Analyst Briefings
- Custom Market Intelligence

Business Consulting
- Market Entry Strategy
- Market Opportunity Assessment
- Customer Outreach and Sales Enablement
- Channel and Alliance Partnering
- Customer Insight

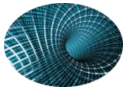
Go-to-Market Services
- White Papers/ Custom Content
- Multi-Media
- Webcasts/ Speakers
- Sales Enablement

Conferences and Events
- Public events
- Custom events
- Roundtables
- Roadshows

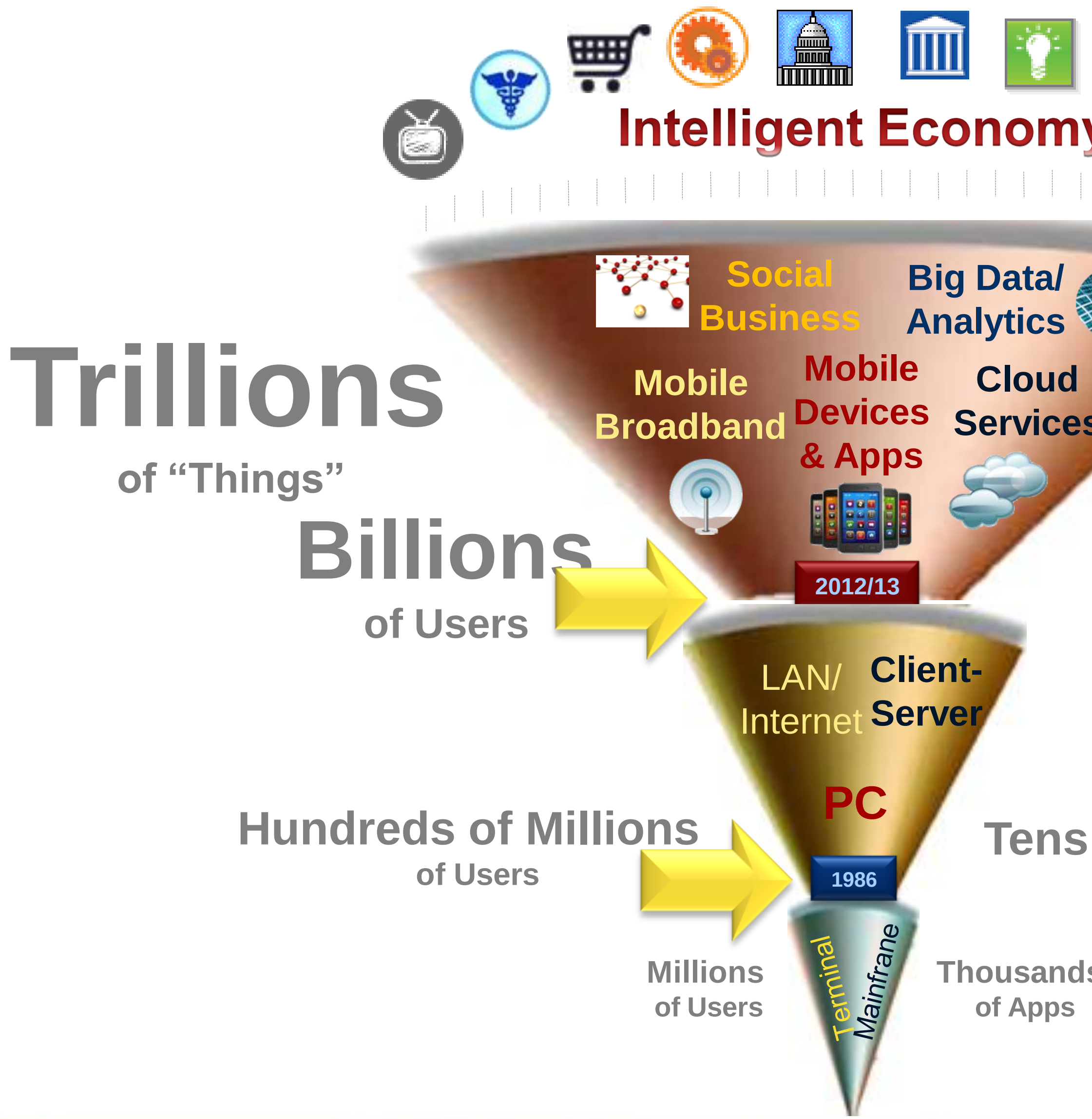
© IDC

The New Platform for Growth

New Realities & New Paths

-  Mobile Devices and Apps
-  Cloud Services
-  Big Data and Analytics
-  Next-Gen Solutions

Third Platform for Industry Growth



© IDC

Fork-in-the Road **25 Years Ago**

IDC
Analyze the Future

Fork-in-the-Road **Today**

IDC Analyze the Future

"WikiTrivia"

Market Leadership

New Realities & New Paths

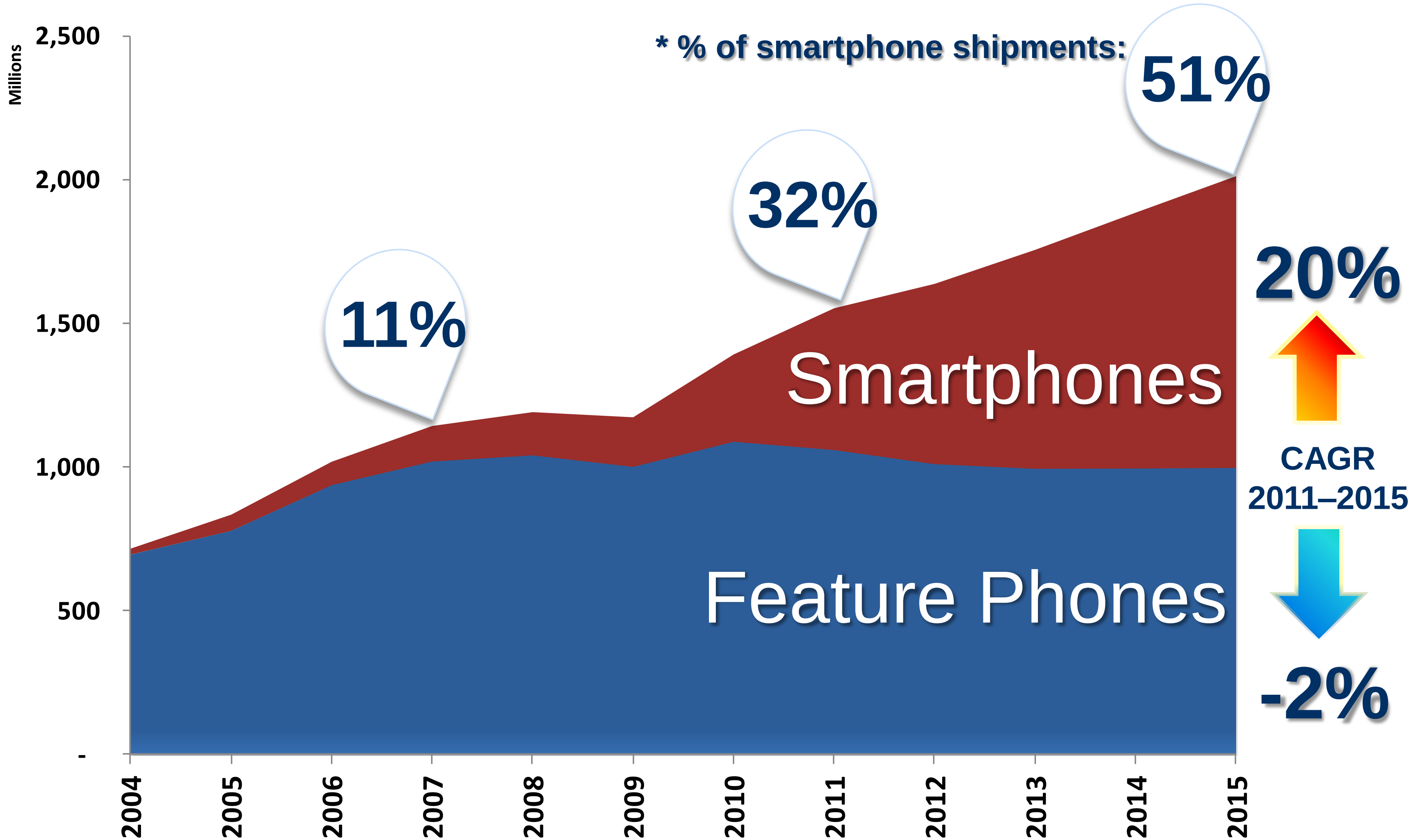
Mobile Devices & Apps

1.3 million
mobile apps

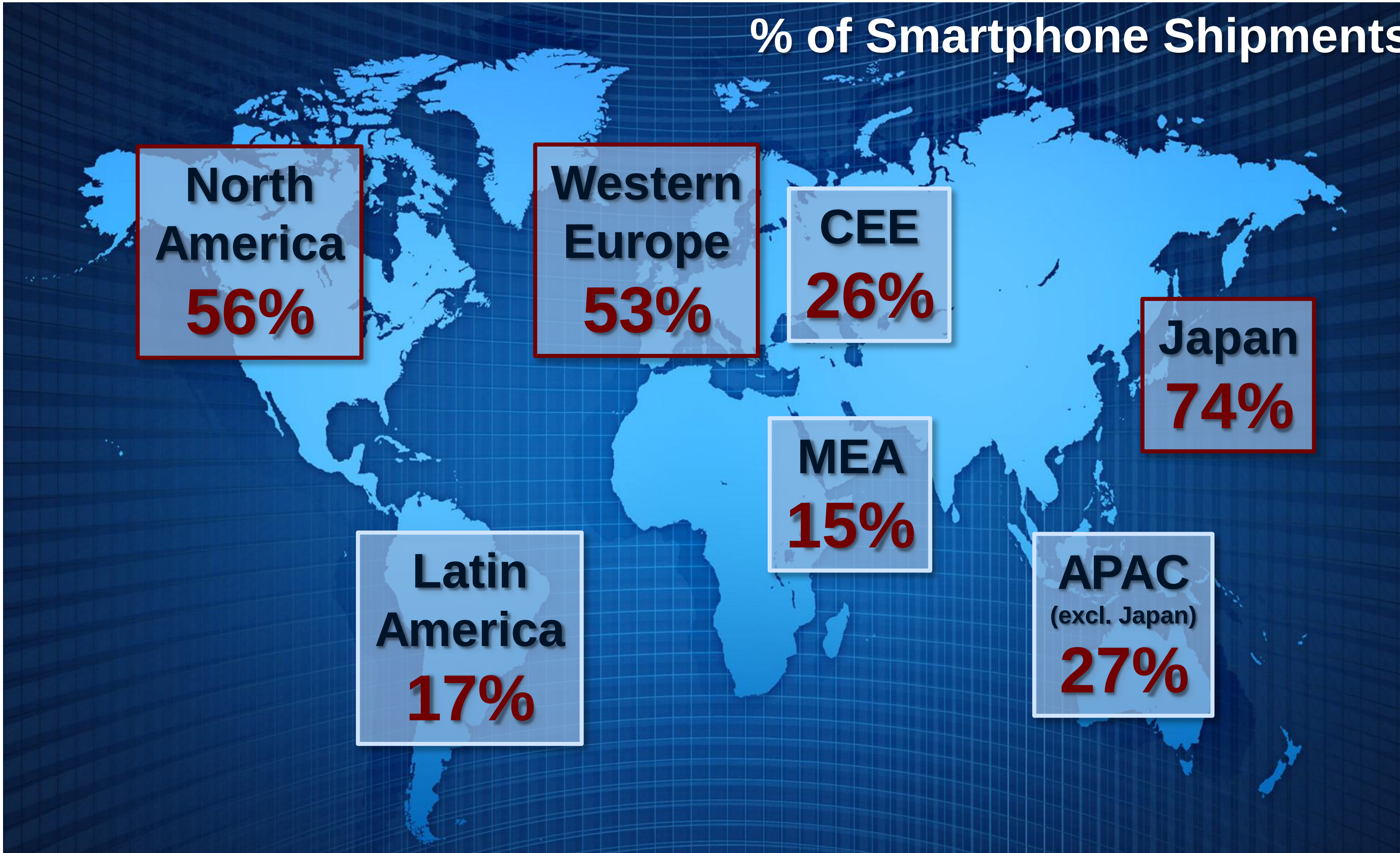
400+ million
app-capable mobile devices

WW Mobile Phone Market Growth

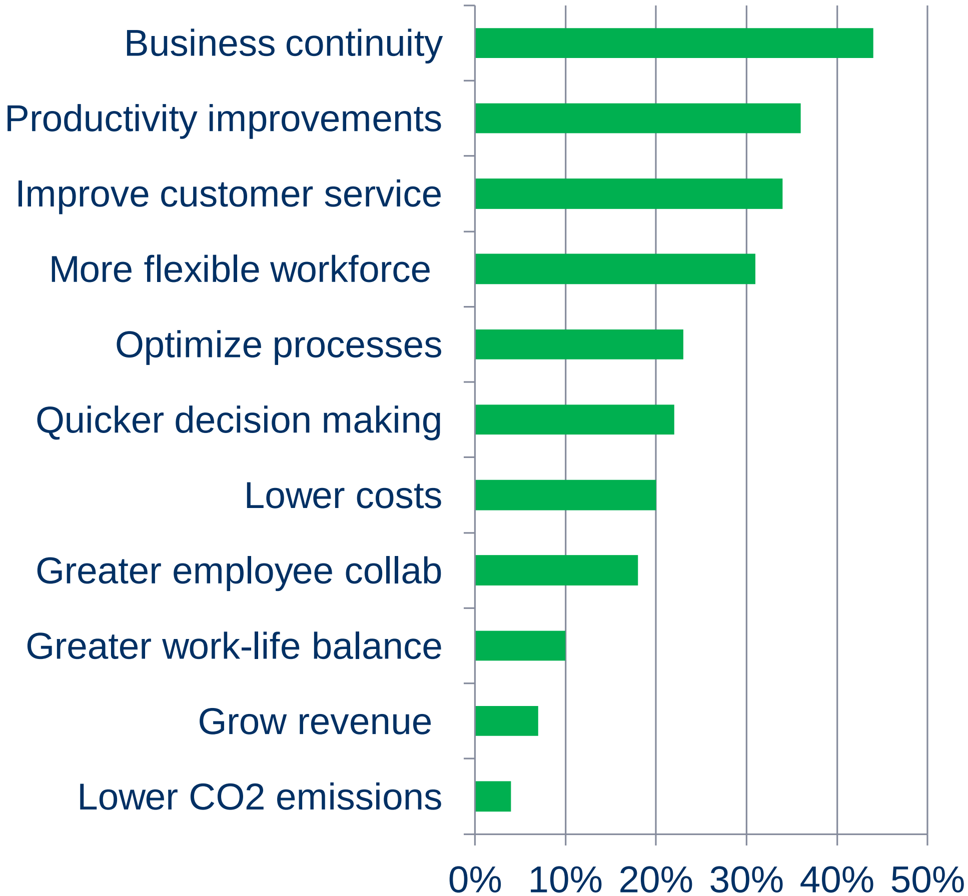
(Unit shipments)



Smartphones vs. Feature Phones



Top Benefits and Challenges of Mobile Working



What are the most significant business benefits your company derives from investing in mobile workforce solutions?

n = 372

Source: IDC's EMEA Enterprise Mobility Survey 2H2012.

What have been your top three challenges in supporting your mobile workforce?

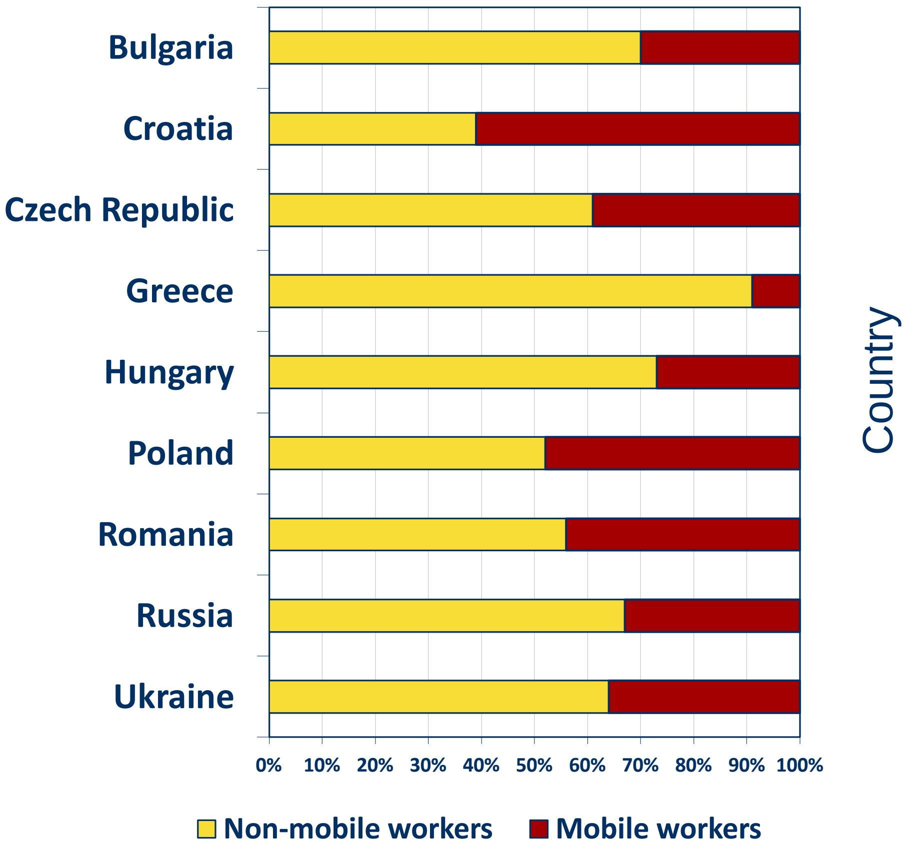
n = 372

Source: IDC's EMEA Enterprise Mobility Survey 2H2012.

Mobility Readiness & Mobility Strategy

Mobile Workforce & Radius of the Mobility Strategy

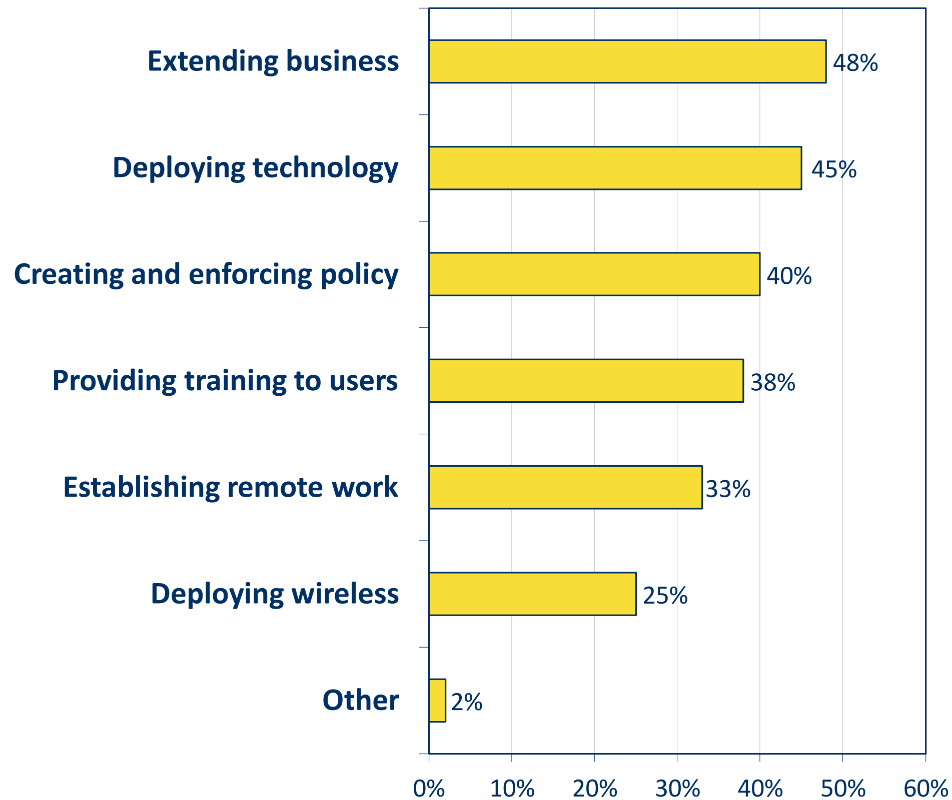
Q: What percentage of your employees **work only from the office**, that is, do not work remotely, do not work from home, and do not work from clients' premises but may work from one of your company's other offices?
Base: All organizations



N = 1,577

Source: IDC IT Buyers' Pulse Survey

Q: What **aspects of a mobility strategy** are (or are planed to be) incorporated **into your business strategy**? Please select all that apply. Base: Organizations with an existing or planned mobility strategy



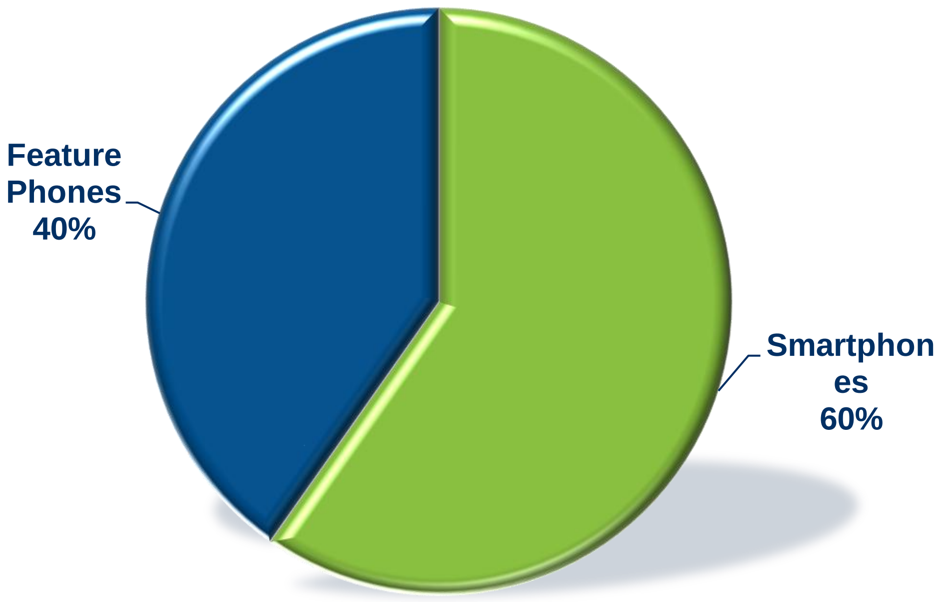
N = 915

Source: IDC IT Buyers' Pulse Survey

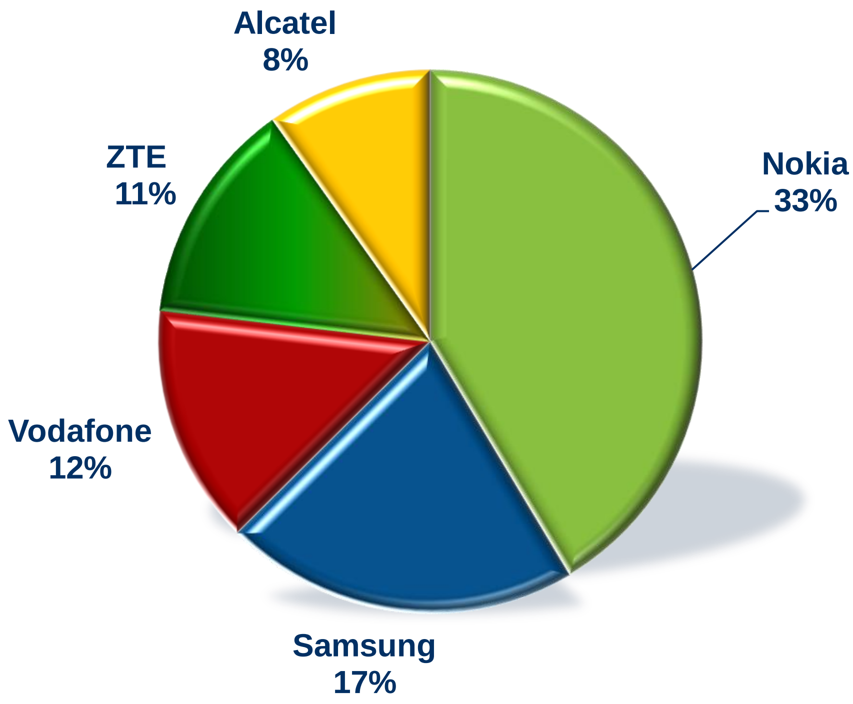
© IDC

Greek Mobile Phones Market

2011 Mobile Phones market size: $0.5bn

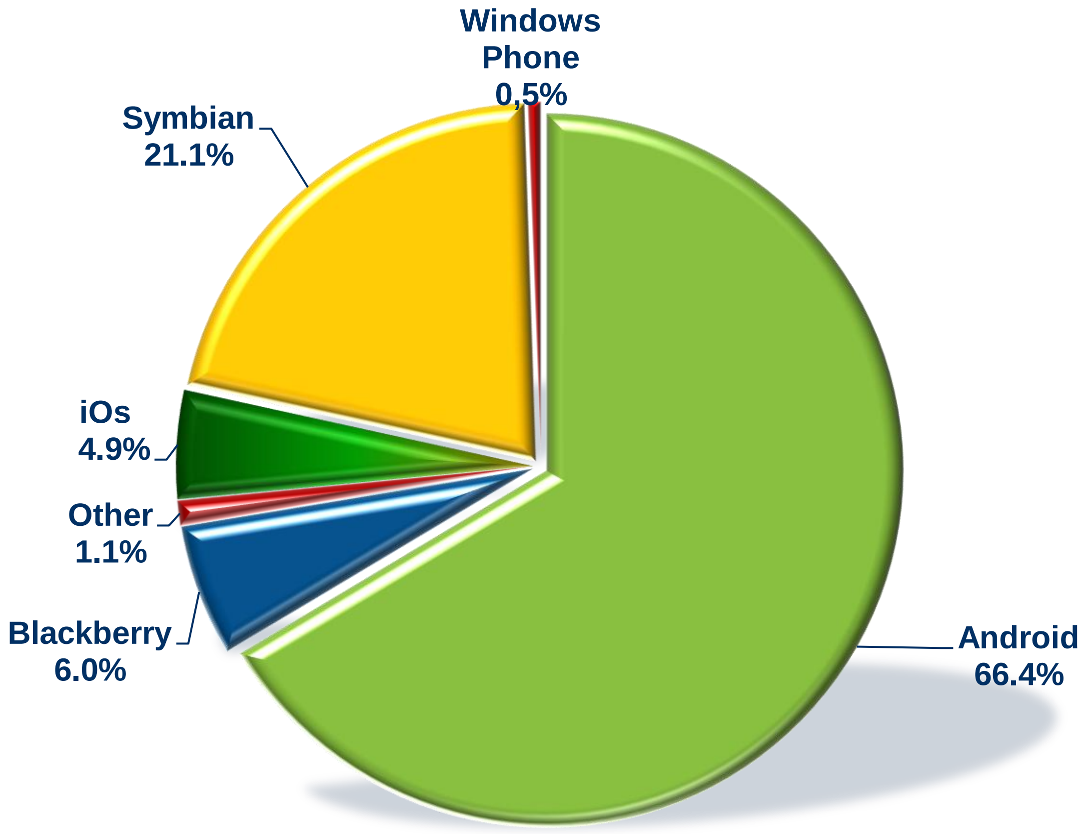


2011 leading mobile phone vendors (units)



Greek Smartphone Market: OS Shares

Smartphone OS Market Share, 2011 (units)



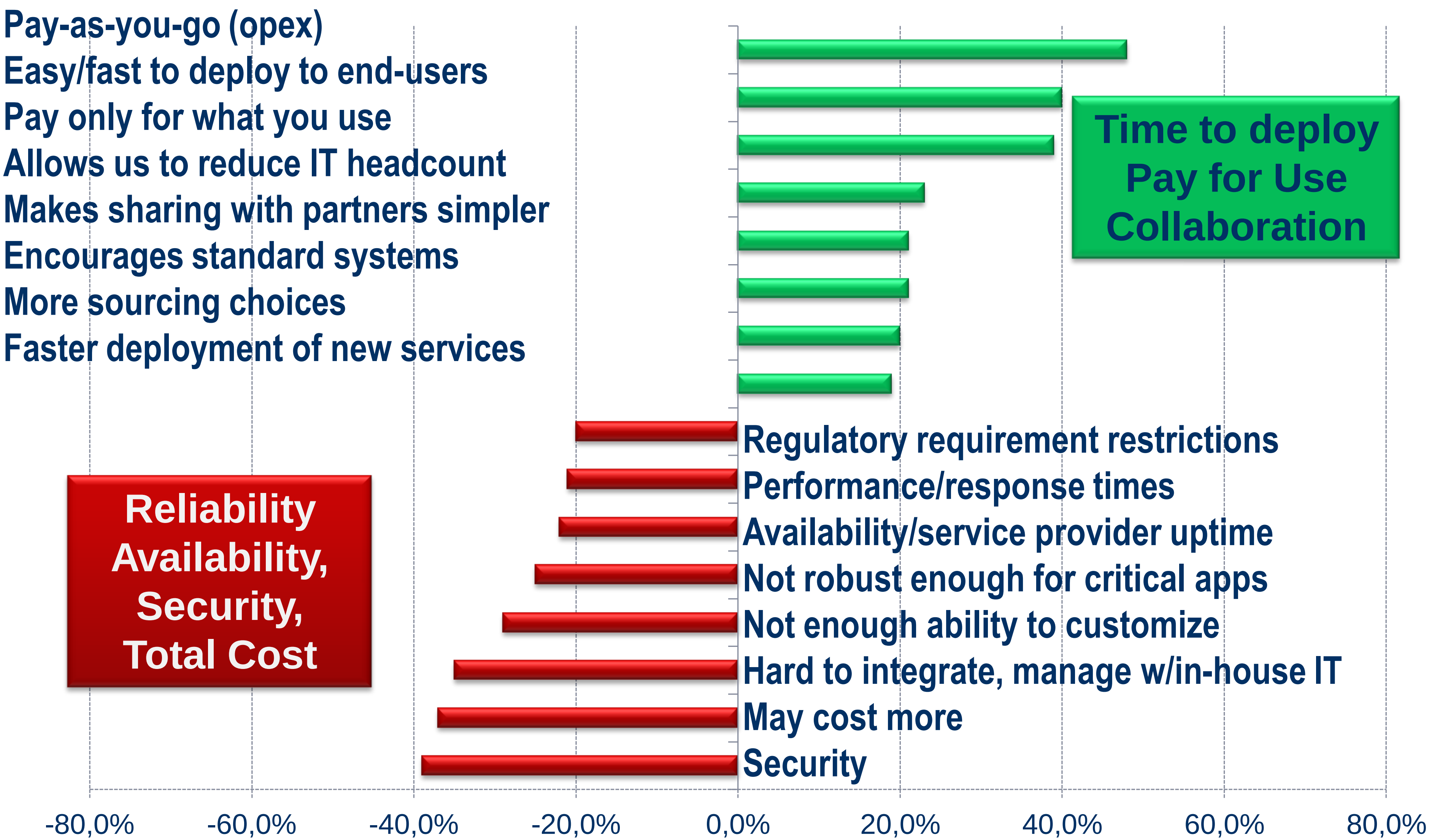
Source: IDC

New Realities & New Paths
Cloud Services

80%
of *new* enterprise apps
have been developed for cloud

almost 20%
of 2015 spending on
enterprise apps
will be via the cloud model

Cloud Benefits and Challenges

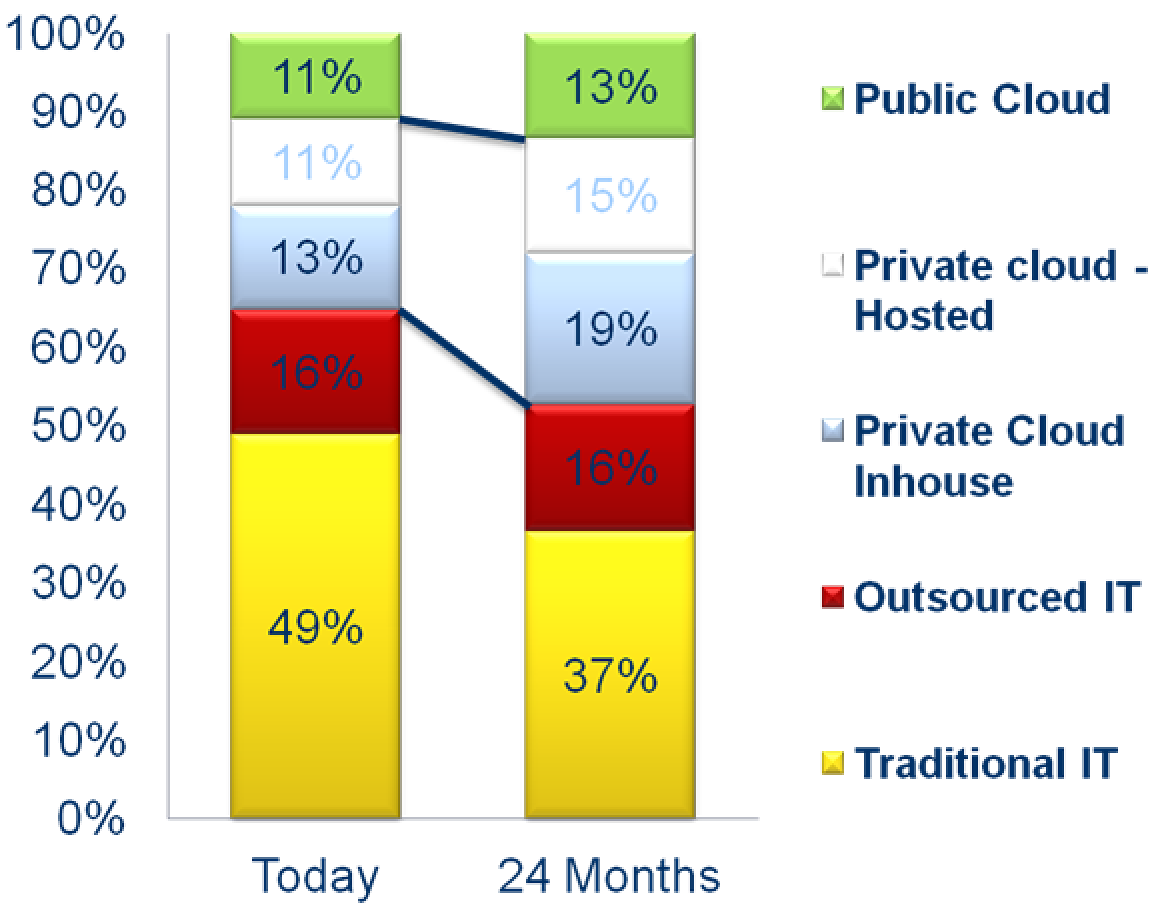


IDCs Cloud Computing Survey, n=603

© IDC

Cloud Brings Shifting to IT Spend

Q. Please estimate how much of your company's IT budget will be allocated to buying and managing these different types of IT services



- Public cloud is transformative and challenges all our notions about how IT is bought, staffed, operated, and capitalized
- Private cloud is evolutionary for the vast majority of enterprises, and the likely on-ramp to cloud for the next 24 months
- Hybrid approaches to IT delivery are already a standard, but cross-platform management is the next frontier

Source: IDC's Cloud Computing Survey, n=603

Future View of the Market: 2013

Cloud Apps Consolidating, Winning; Cloud Platforms Verticalizing

Cloud M&A will accelerate by 50%, with $25Bn in SaaS deals in the next 20 months

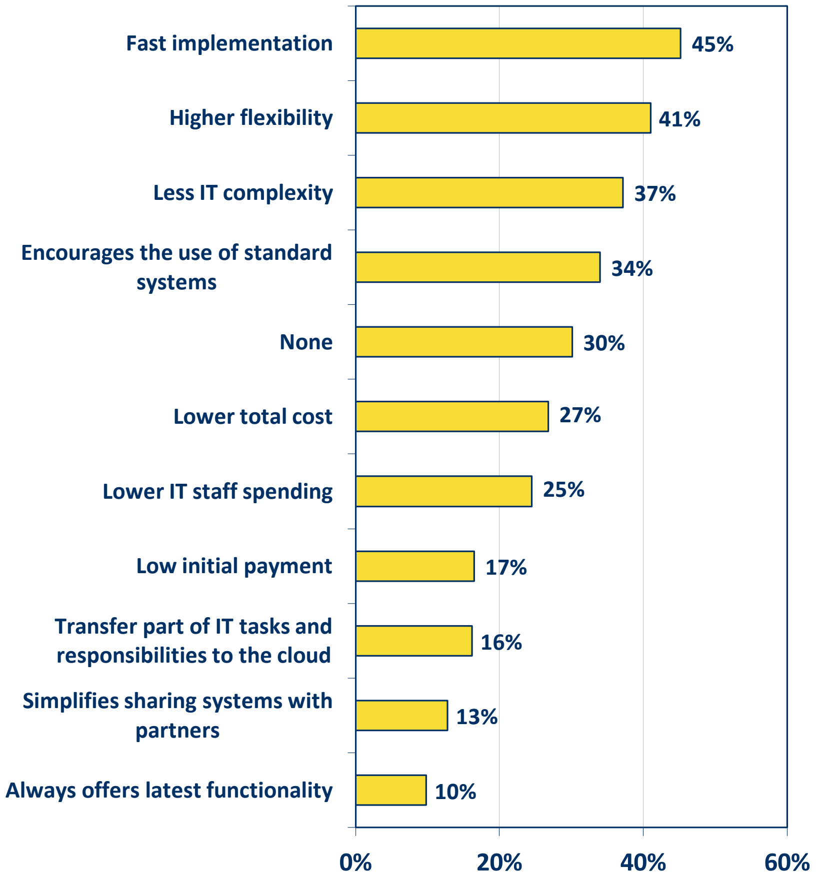
An explosion in “Industry Platform as a Service (PaaS)” offerings; “Horizontal PaaS” will become more commoditized

2013 will be a year of big jumps in small and medium-sized business cloud use

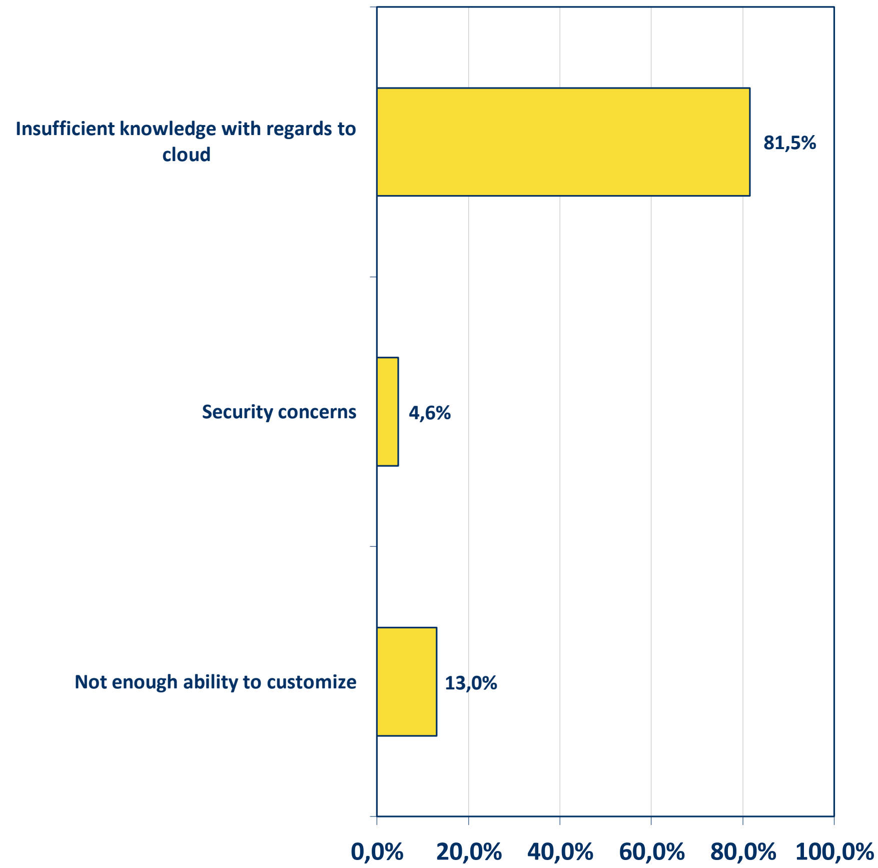
Perceptions of Cloud: Greece

Drivers and Barriers to Cloud Usage

Q: What do you consider to be the **main benefits of using cloud at your organization**? Please select all that apply.
Base: All organizations, excluding those not familiar with cloud



Q: What are the **main reasons for not using or not considering cloud** at your organization? Please select all that apply
Base: Organizations not using and not planning to use cloud



N = 15

Source: IDC IT Buyers' Pulse Survey

Big Data / Analytics:
Changing Priorities in Fast Shifting World

IDC Analyze the Future

MORE DEVICES

MORE APPLICATIONS

MORE CONTENT

MORE DATA

The Keys To Big Data Success

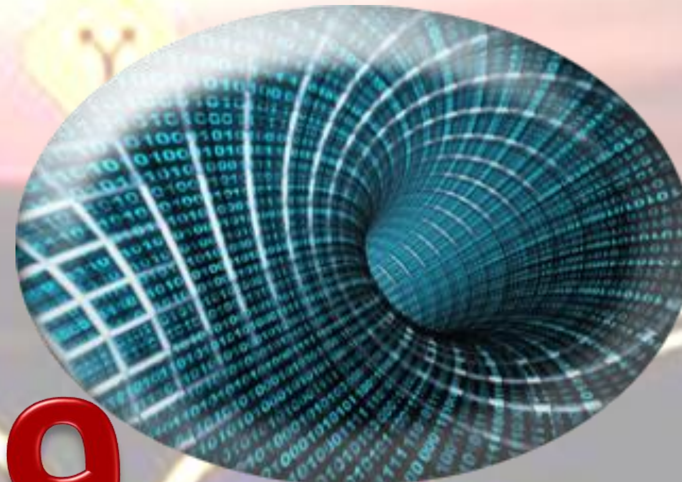
4 Four V's of Big Data: Volume, Variety, Velocity and Value

3 Three C's of the Big Data Value Chain: Collection, Consolidation and Consumption

3 Three Big Data Landmines to Avoid: 'bridge too near', 'Preparing For The Last War', and "Not Collected Here" Syndrome

New Realities & New Paths

Big Data/Analytics

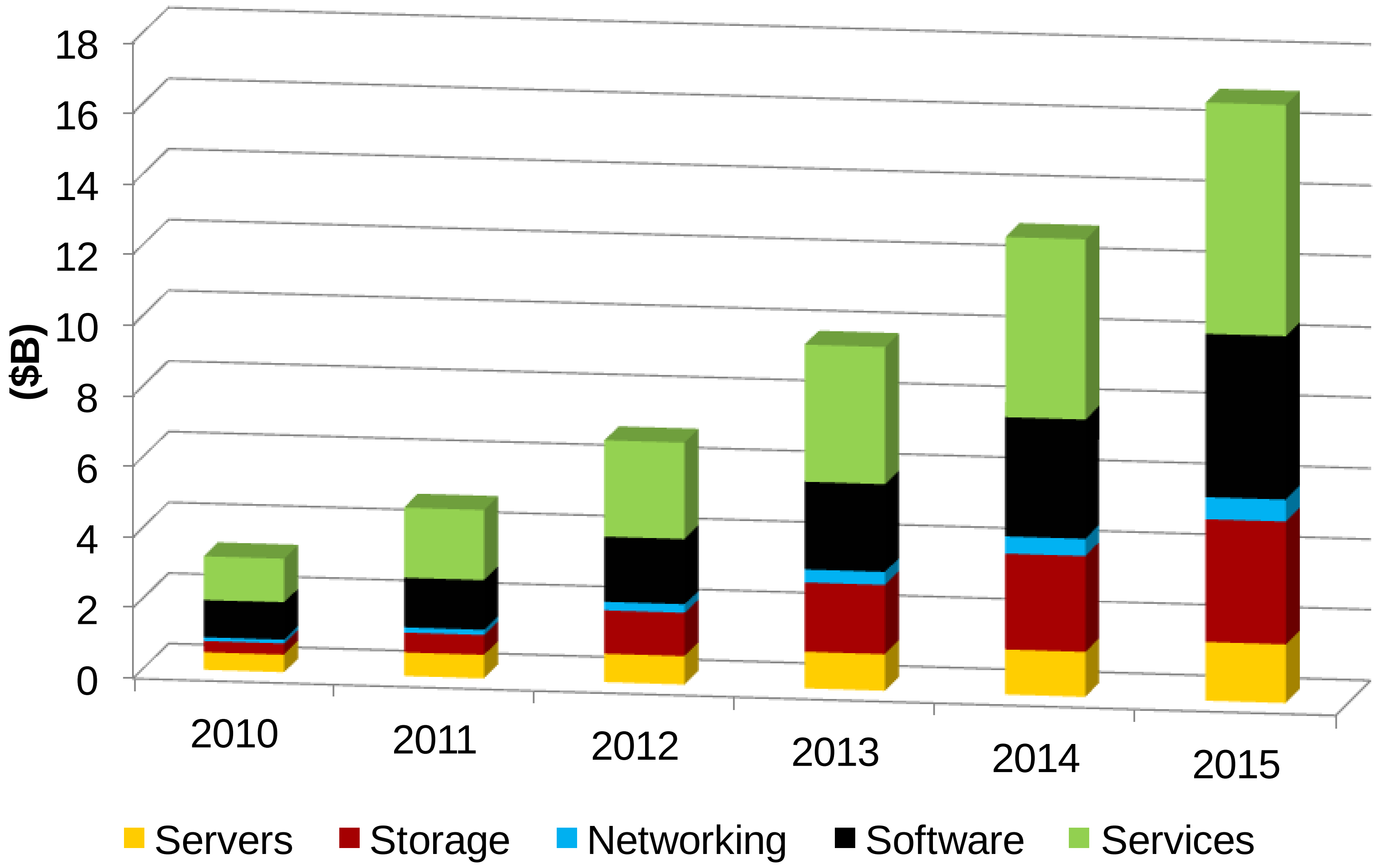


1.8 Zettabytes 2011

8-9 Zettabytes 2014

xTimes Volume & Velocity

IDC Big Data Market Sizing



New Realities & New Paths

Next-Gen Solutions


Thank you