

IOTWeek

Dublin — June 20-23, 2022

A quick view on Global Trends and IDC Predictions

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GLOBAL VISION:

IoT TODAY AND BEYOND

IOTForum

What's a Digital-First Europe?



Digital-first means Value-first. Value realization grows exponentially as organizations move the needle of their strategies from an internal to external focus – **expanding to customers, the ecosystem, and society.**

3 Key Numbers

Society

Approximately **25% of the €750 billion** Next Generation EU Recovery Package focused on **Digital**

Economy

Digital spend grows at **4 times** the GDP
16% vs. 4%

Impact

In 2021, we've seen a **10% increase** in the number of companies delivering **ROI from Digital**



IDC FutureScape



70% of CEOs of large European organizations will be incentivized to generate at least 40% of their revenues from digital by 2025



FutureScape 2022 Predictions in a Nutshell



Future of Work

In 2023, \$140 Billion will be invested by European enterprises in workplace transformation, with 60% of organizations achieving improved employee experience thanks to collaboration across the C-Suite



Future of Customers and Consumers

The rise of physi-digital experiences will drive 35% of top European enterprises to establish physi-digital design innovation teams by 2024, with a focus on CX that provides strategic differentiation and customer lifetime value



Future of Operations

In 2022, 30% of European companies will be utilizing supply chain control towers to get real-time visibility into the supply chain within their businesses and beyond, enabling them to see disruptions earlier and make better mitigation decisions



Future of Digital Infrastructure

By 2024, 50% of European organizations will spend 10% of their ICT budget to cover additional costs to adhere to the digital sovereignty principles adopted in the EU



Future of Trust – Security

IT By 2024, 60% of major European enterprises will have increased their annual spend in cyber resiliency by 20% to secure their digital first investments against cyber risk – driving an additional €5.9bn in new security spend in 2024



Future of Intelligence

By 2024, the 50% of European organizations that use an AI ethics playbook will garner greater customer trust, reducing customer churn by up to 30% compared with their competitors



Future of Industry Ecosystem

By 2023, \$ 334B (the Danish GDP!) in European digital spending will be driven by ecosystem-empowered use cases



Future of Connectedness

5G connections in Europe will grow more than 8x from 2021 to 2025, reaching 600 million; 5G monetization will depend on delivering innovative real-time, data-intensive use cases for hyper-connected ecosystems



Future of Trust – Sustainability

In 2023 60% of European Organizations will prioritize digital investments for sustainability-related goals, driving more than \$60B in spending



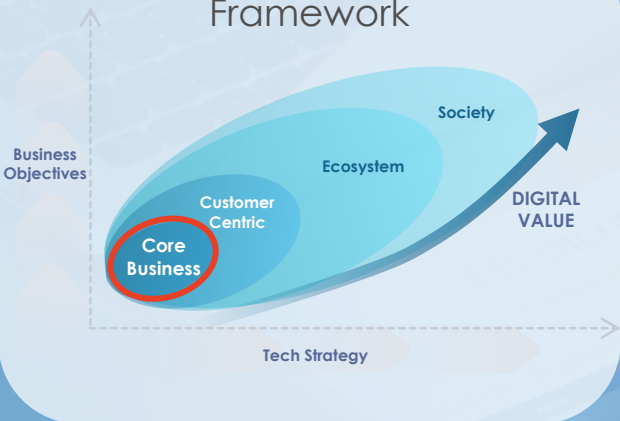
Future of Digital Innovation

By 2023, 70% of European organizations will create disruptive digital value by partnering, buying, or investing in a digital-native start-up, doubling the return on investment for both parties over 3 years

Experience redefining the Future of Work



Digital-First Value Framework



In 2023, **\$140 Billion** will be invested by European enterprises in **workplace transformation**, with **60%** of organizations achieving **improved employee experience** thanks to **collaboration** across the **C-level**



IDC FutureScape

Source: IDC European FutureScape 2022

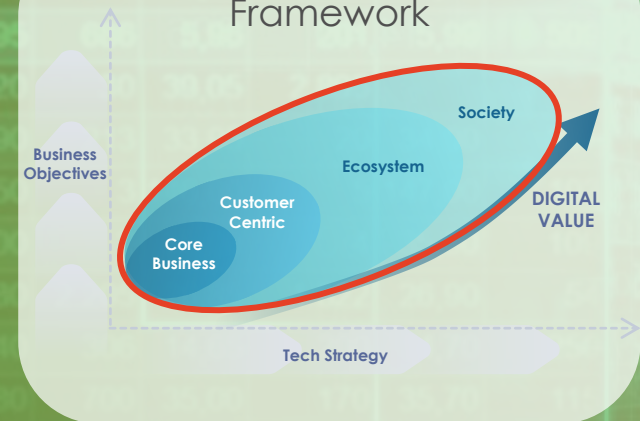


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Digital Sovereignty Driving the Next Phase of Workload Prioritization for the Cloud



Digital-First Value Framework



By 2024, 50% of European organizations will spend **10% of their ICT budget** to cover additional costs to adhere to the **digital sovereignty** principles adopted in the EU



IDC FutureScape

Source: IDC European FutureScape 2022

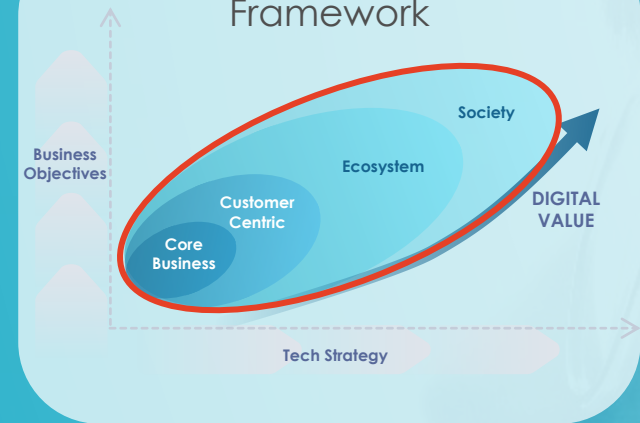


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From Actionable Insights to Responsible Intelligence



Digital-First Value Framework



By 2024, the 50% of European organizations that use an **AI ethics playbook** will garner greater **customer trust**, reducing **customer churn by up to 30%** compared with their competitors



IDC FutureScape

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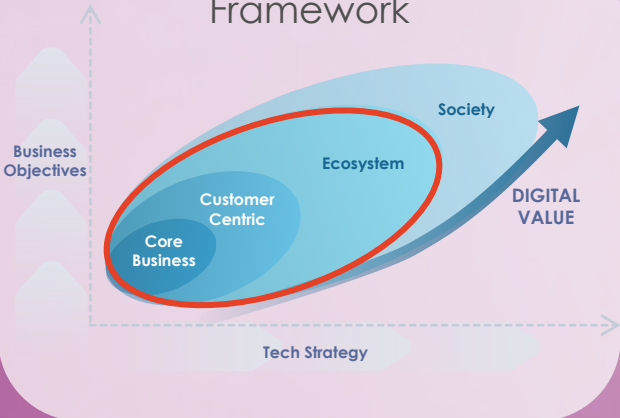


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Enabling New Types of Industry Use Cases



Digital-First Value Framework

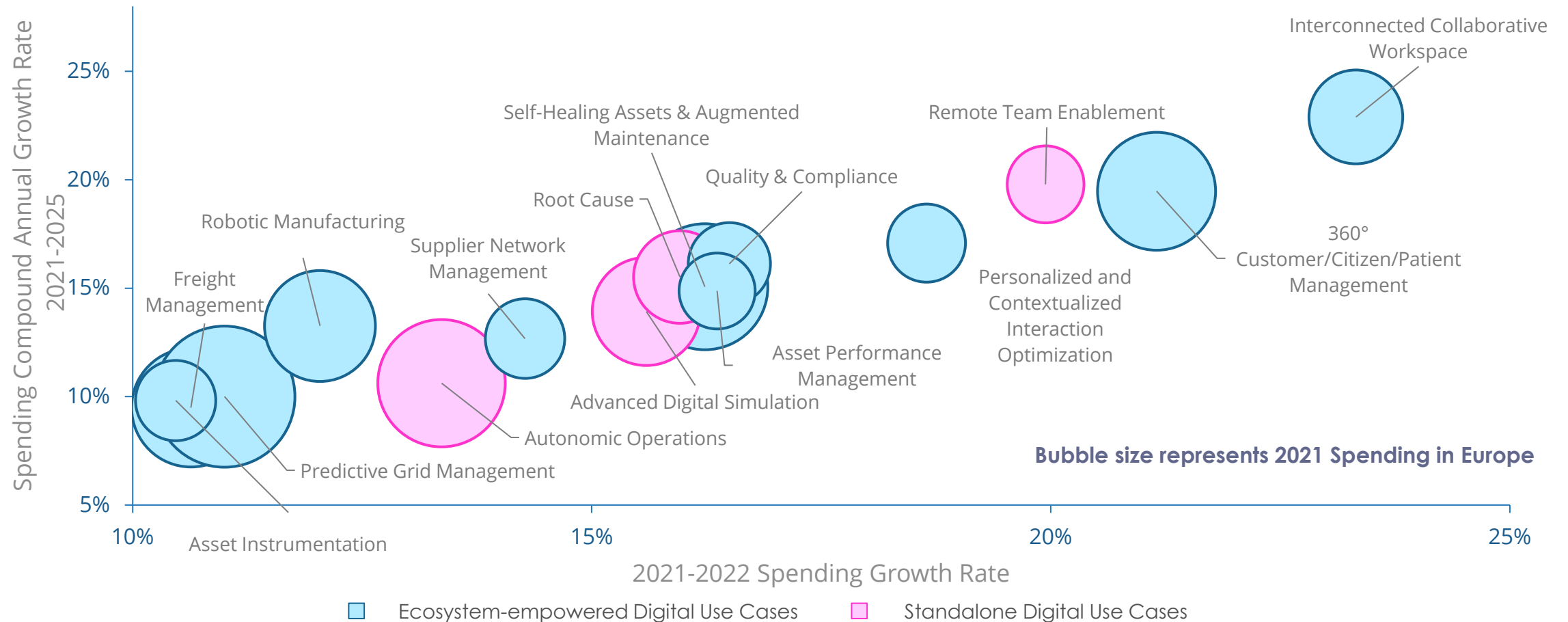


By 2023, **\$ 334B** (the Danish GDP!) in European **digital spending** will be driven by **ecosystem-empowered use cases**

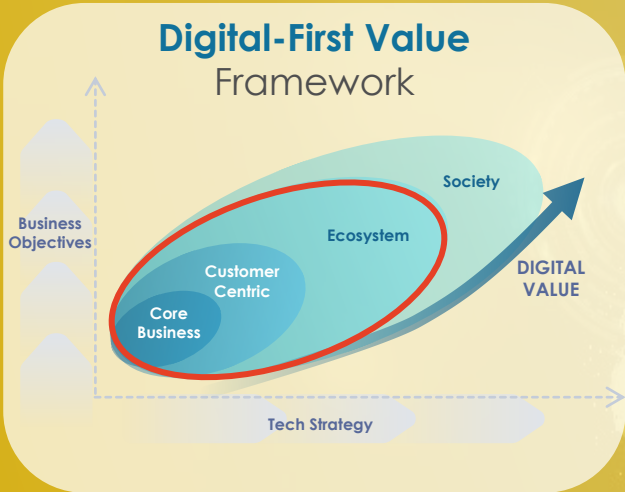


Ecosystem-empowered Digital Use Cases

Top 15 largest spending Digital Use Cases in Europe



Hyper-Connected Ecosystems Need Extreme Connectivity



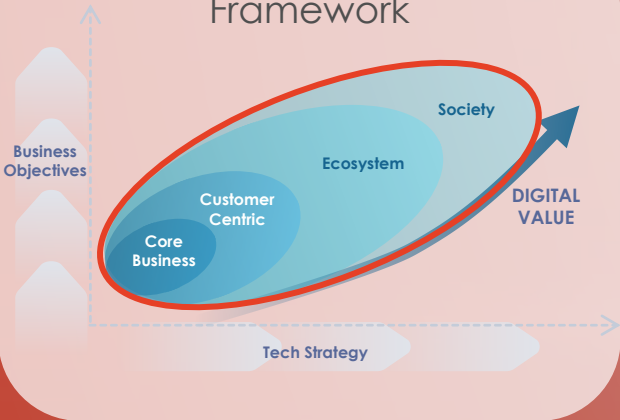
5G connections in Europe will grow more than 8x from 2021 to 2025, reaching 600 million;

5G monetization will depend on delivering innovative real-time, data-intensive use cases for hyper-connected ecosystems

The Intersection of Digital & Sustainability



Digital-First Value Framework



In 2023 60% of European Organizations will **prioritize digital investments** for **sustainability-related goals**, driving more than **\$60B in spending**



IDC FutureScape

Source: IDC European FutureScape 2022



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Key Digital Investments Areas for Sustainability in 2022

By 2022,

60%

of publicly listed European organizations will **redesign business processes and operations** to be able to **generate value** from sustainability initiatives and to **achieve compliance**

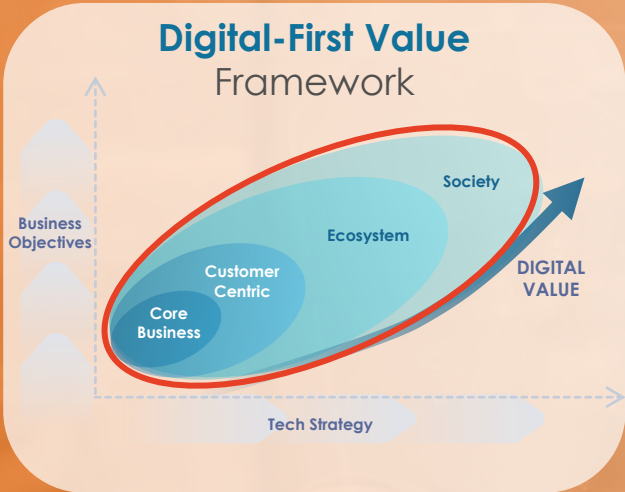


By 2022,

50%

of European organizations will **adopt shared data platforms** to adopt industry **collaborative solutions to track their environmentally-related KPIs** in a **trustworthy (certified and confidential) manner**

Delivering Disruptive Digital Value



By 2023, 70% of European organizations will **create disruptive digital value** by partnering, buying, or investing in a digital-native start-up, doubling the return on investment for both parties over 3 years





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Thank you!

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