

Global Market and Technology Trends – *2010 Recovery and Transformation*

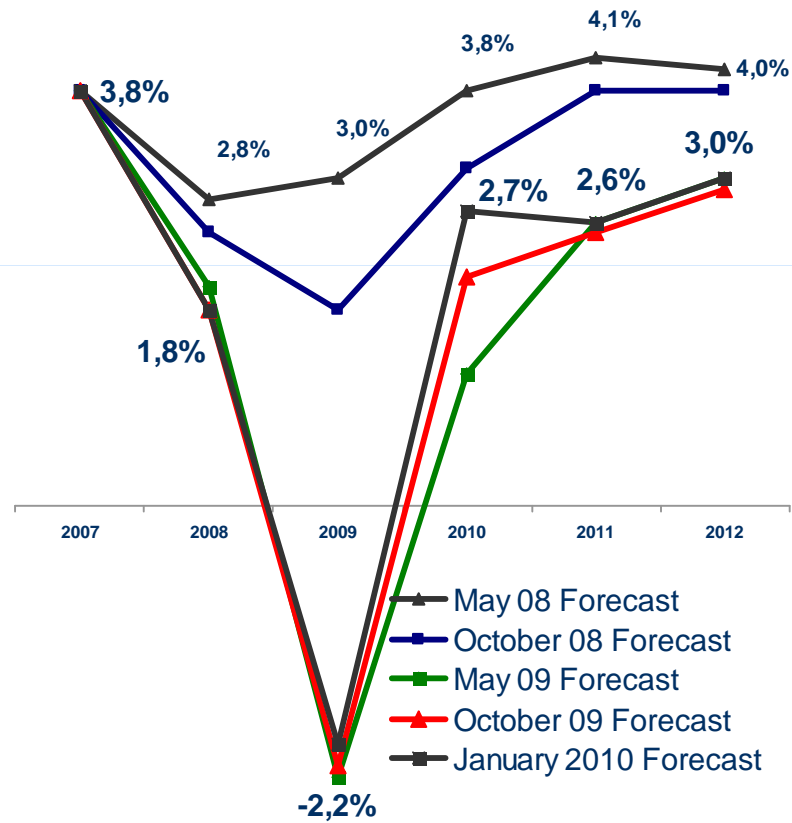
RCI IT B2B Matchming Summit

Skopje, Alexandar Palace Hotel, April 7, 2010

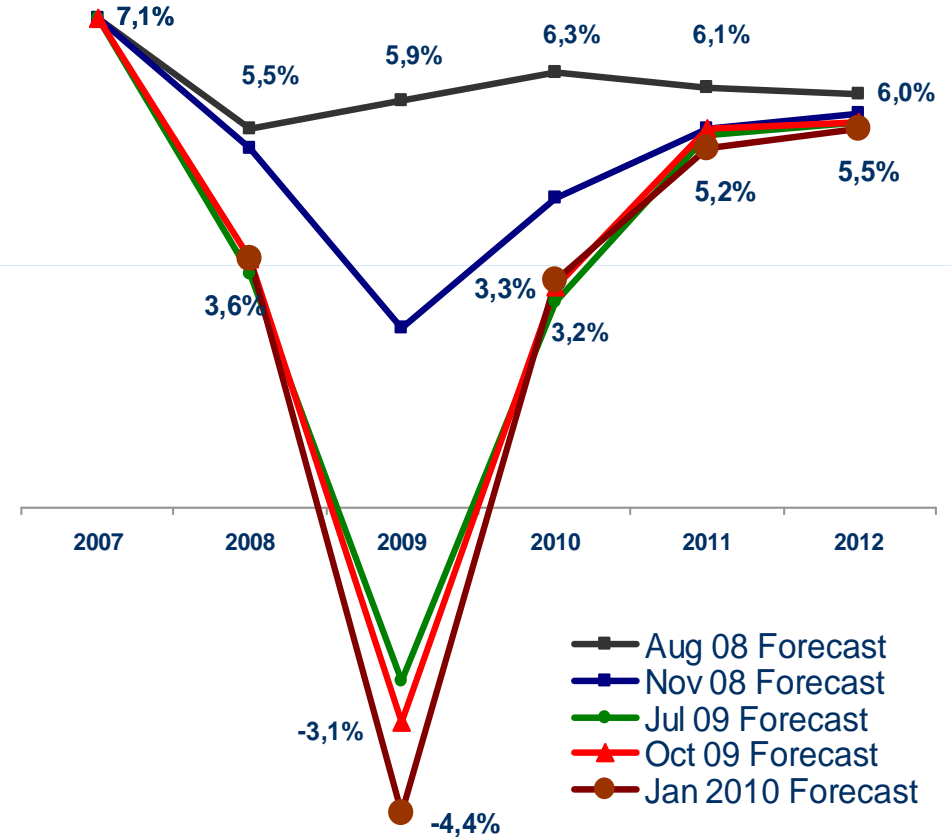
Boris Žitnik
Managing Director
IDC Adriatics

Changing Economic Forecasts

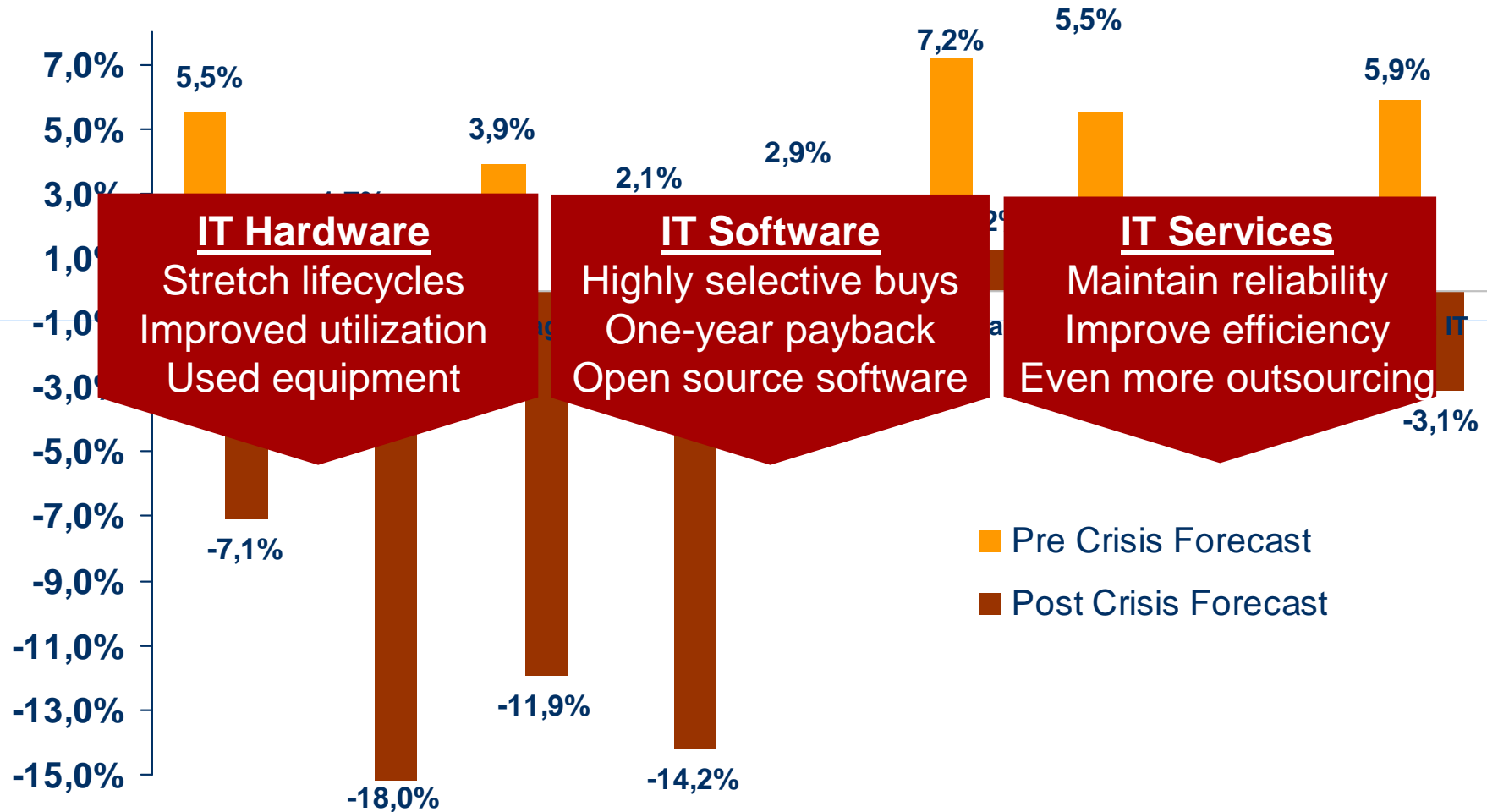
Worldwide GDP Forecast



Global IT Spending



2009 Worldwide IT Spending YoY Growth



New Reality

Moving from Growth to Value/Cost Savings, Effectiveness and Innovation



Cost 'Take-Out'



- Data Center Consolidation
- Virtualization
- Cloud
- Outsourcing

Business Alignment



- Metrics (measurement)
- Collaboration
- LoB Application Modernization
- Business Analytics

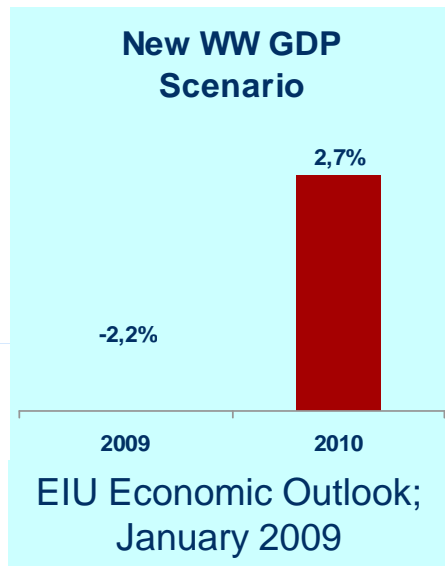
Risk Management



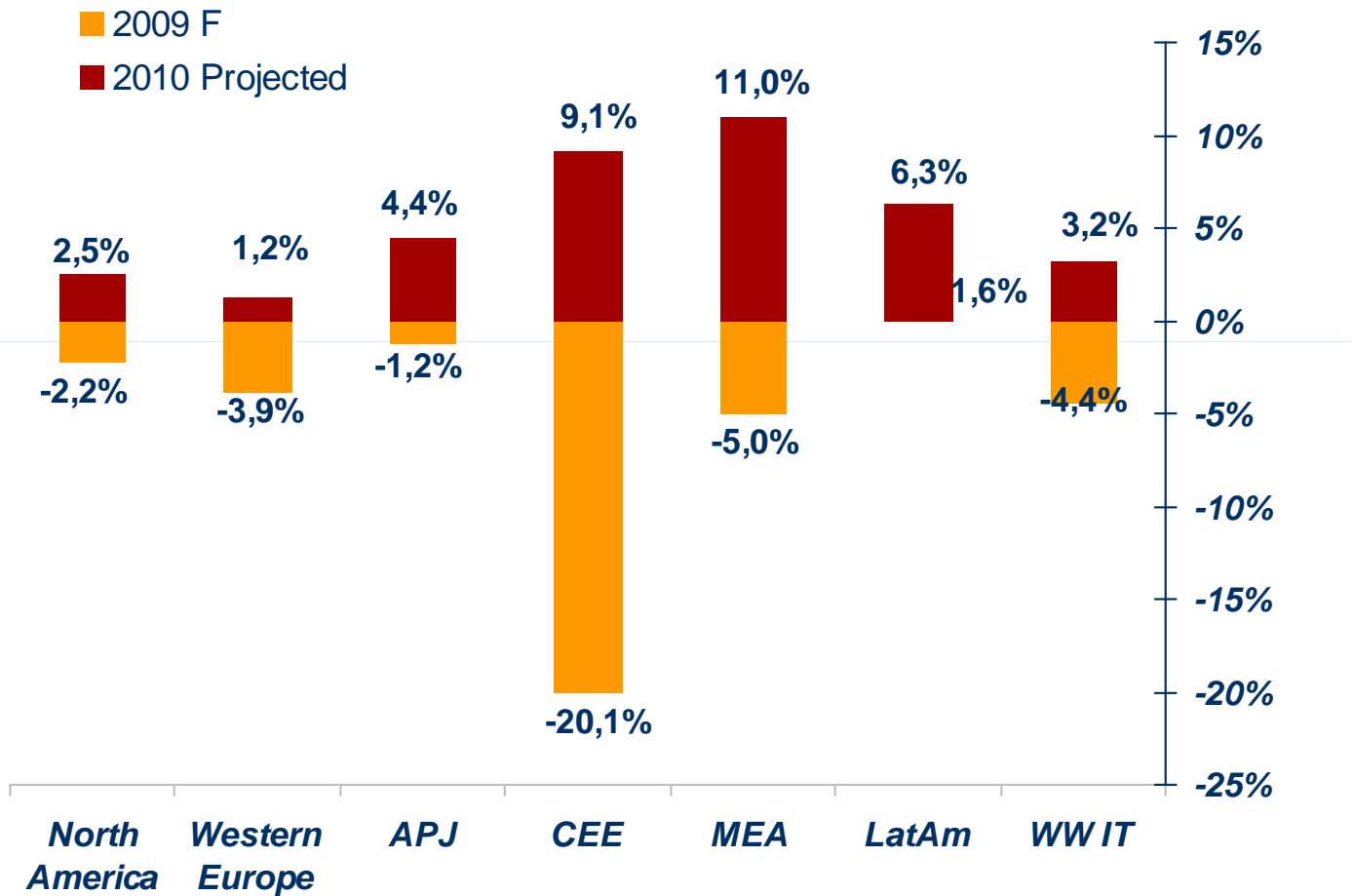
- IT Governance
- Business Continuity
- Disaster Recovery
- Storage
- Security
- Compliance

2010 - Recovery

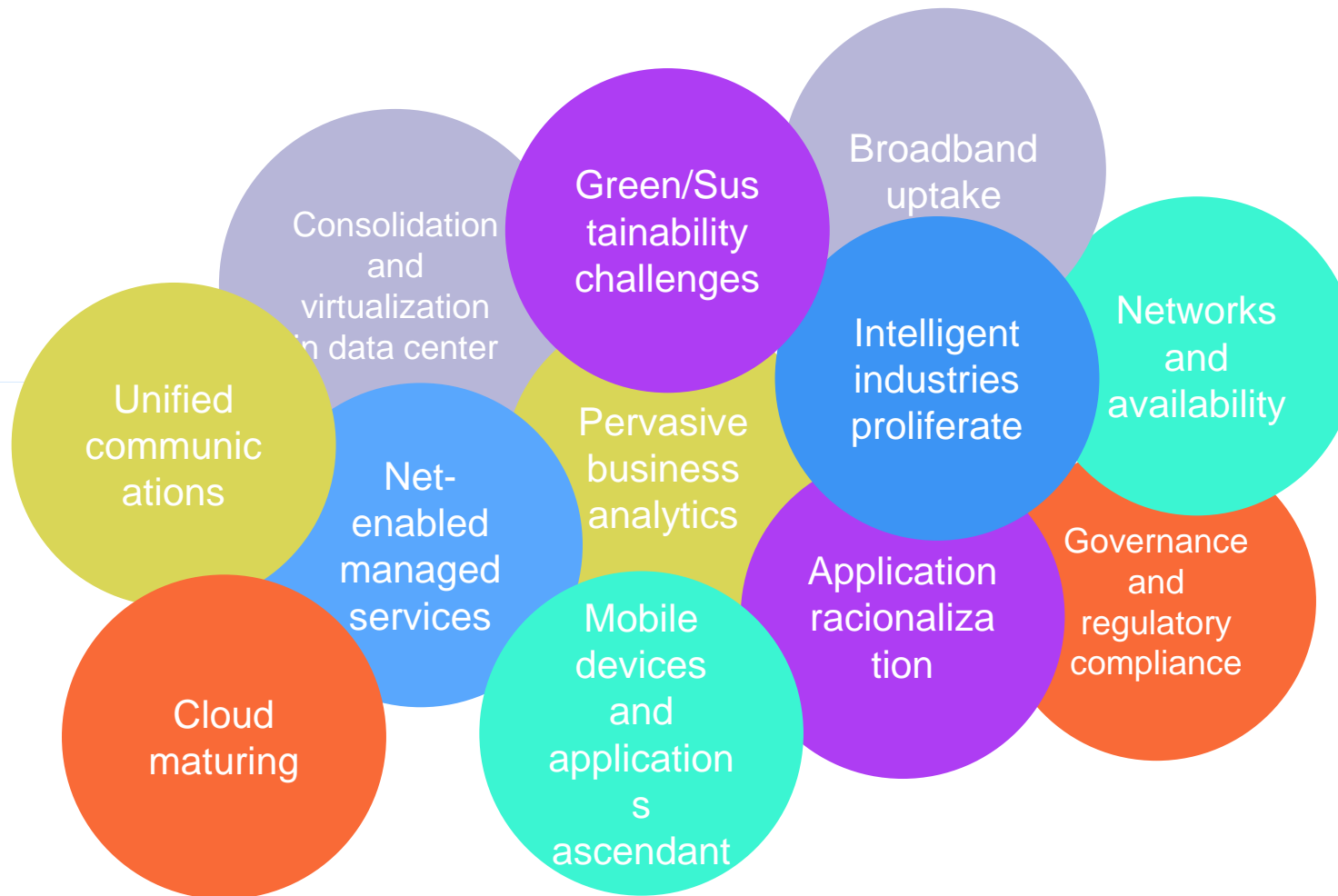
Worldwide IT Spending Forecasts



\$1,474 billion



2010 - Transformations



2010: Artifacts of The Intelligent Economy



1 billion mobile Internet users; 500,000 mobile phone apps



Public Cloud spending of \$23 billion, (up 35%; 65% in US)



700 million social networkers; “socialytic” apps



50 million servers in place, half virtual; micro servers coming on line



630 million laptops in place; 80 million netbooks



20 million smart meters in US



1.2 billion mobile phones ship; 220 million smart phones



7 billion communicating devices in place, 5 billion *not* computers

Where We Are on the Journey

The IT Business Cycle Pattern

New technology initiates a new paradigm, creating a speculative bubble



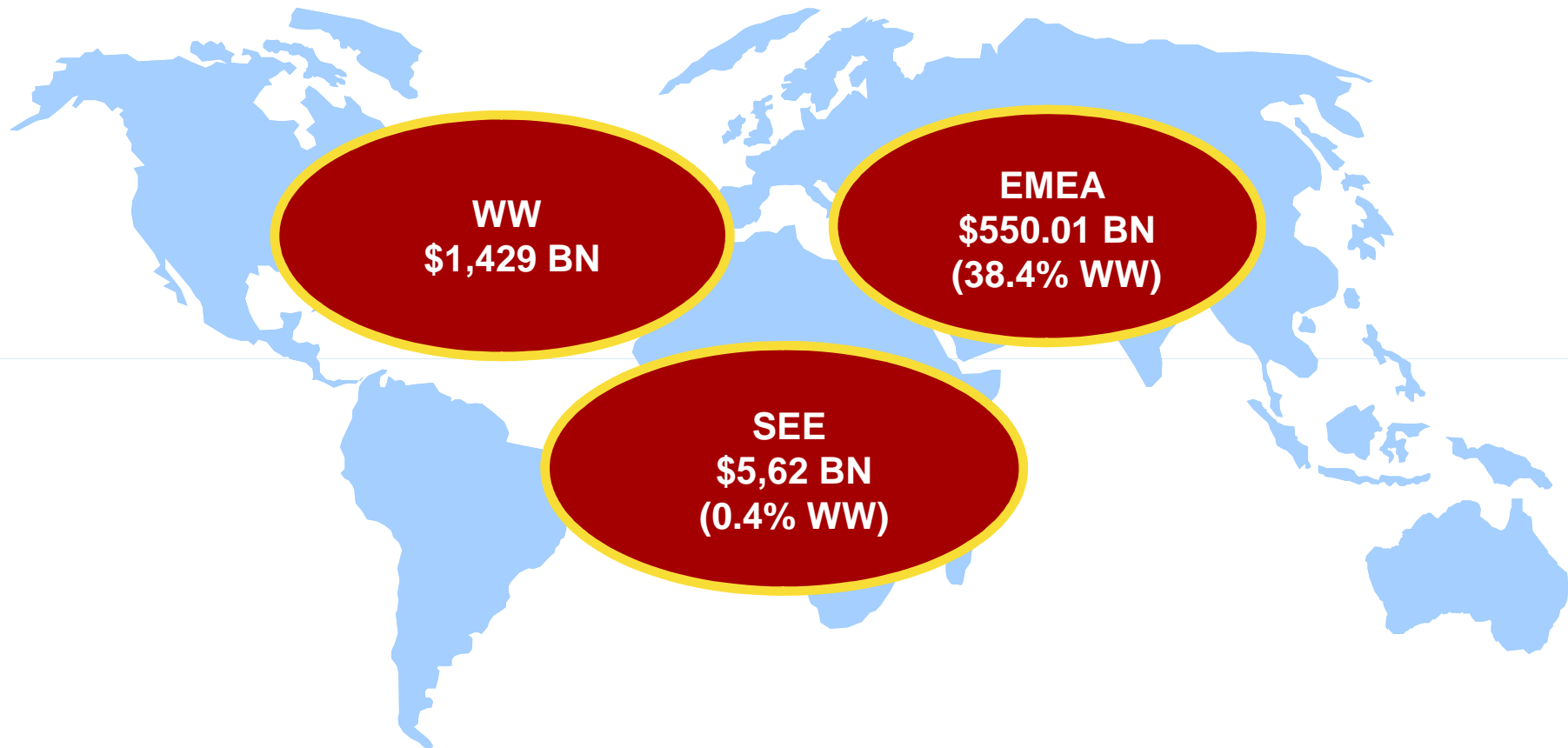
Long term exploitation of the new paradigm begins with technology and business innovations that work within the constraints of current mega trends ...

... which eventually leads to a new technology ...



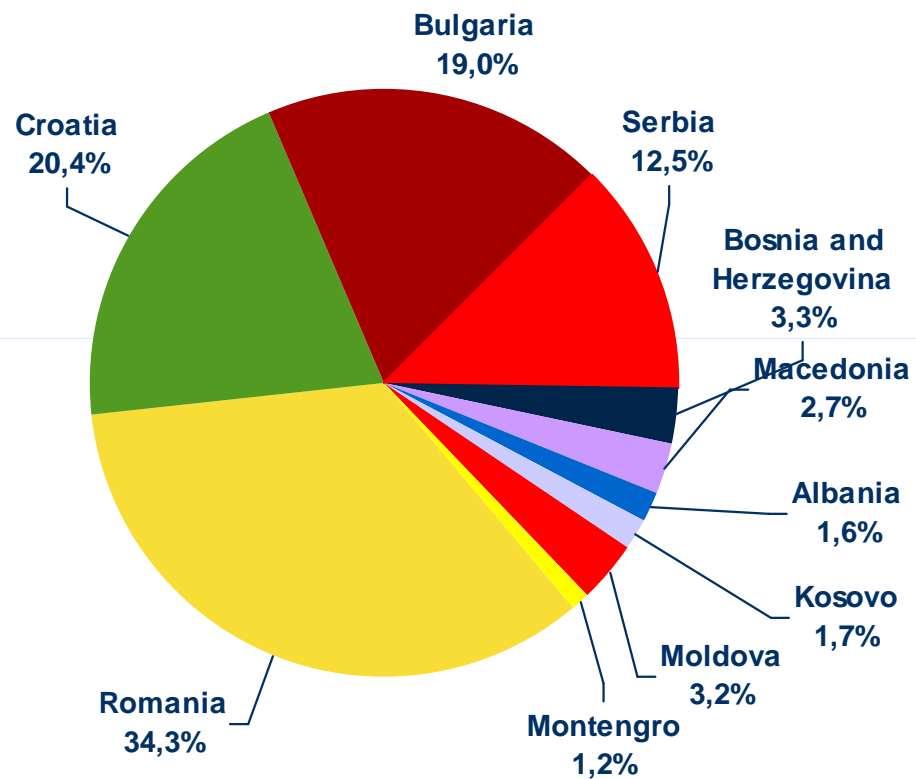
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SEE Countries Share in Global IT Spending, 2009



WW Total 2009 = \$1,429 BN

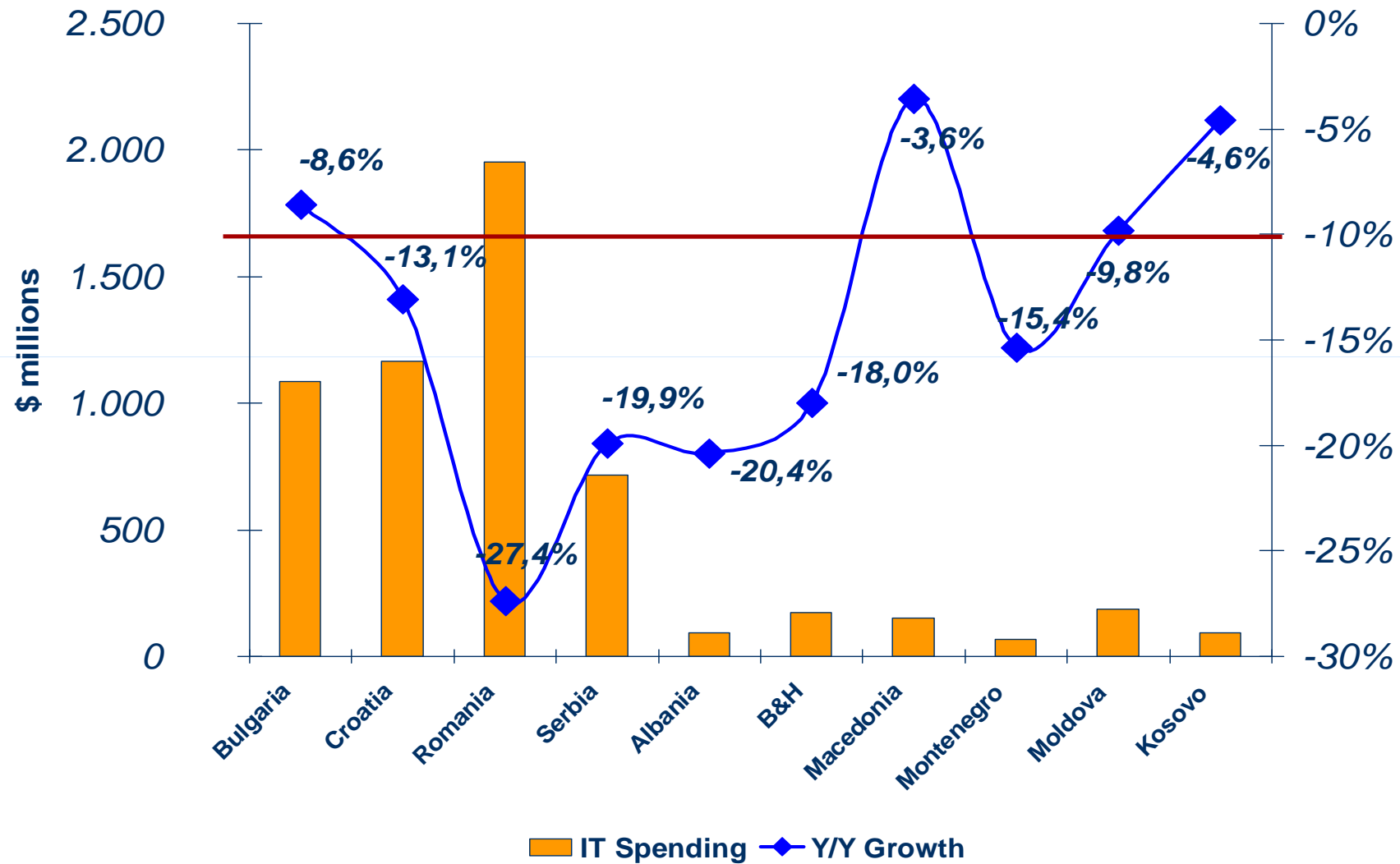
IT Spending in SEE Countries, 2009 (Preliminary)



Total = US\$ 5,61 Billion
09/08 Growth = -18,6%

- Population: 58.35 Million
- IT per Capita: US\$ 96

SEE Market Dynamics, 2009 (forecast-preliminary)



Thank you!



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