Perspectives on IoT, Cloud and Big Data

Gabriella Cattaneo
IDC European Government Consulting
By 2020 Cloud spending in the EU will represent almost 11% of total general IT spending.

EU Cloud Market (€ Bn) Baseline Forecast (% of general IT spending)

2013 Spend 2.8 €Bn
2015 Spend 5.9 €Bn
2020 Spend 44.8 €Bn

Source: Uptake of Cloud in Europe by IDC on behalf of DG CONNECT, 2014
EU SMEs adoption of Cloud is projected to grow but slowly

Source: Uptake of Cloud in Europe by IDC on behalf of DG CONNECT, 2014
Cloud will contribute to grow the EU economy and employment

303K new companies...

Up to 1 Mill jobs...(from 2015)

Source:
Source: Uptake of Cloud in Europe by IDC on behalf of DG CONNECT, 2014
Towards the «innovation stage» of the cloud marketplace

- Enterprises are moving to cloud first strategies
- Cloud-based solutions will triple by 2020
- Public and private cloud will merge into hybrid clouds
- Cloud open source is increasingly relevant and successful
Cloud is a key element in the Digital Transformation scenario

Continuous Industry Transformation

Future of Work
Immediacy

Abundance
New Buying Centers

Efficiency
Personalization

3D Printing

Internet of Things

Cognitive Systems

Robotics

Next Gen Security

INNOVATION ACCELERATORS

INNOVATION ACCELERATORS

Cloud

Mobility

Social Business

Big Data/Analytics

3rd Platform
Millions of Apps • Billions of Users • Trillions of Things

2nd Platform

1st Platform

Source: IDC
In the Hyperconnected World Every Business will become a Digital Business

Better skills and competences are needed to drive the Digital Transformation

Source: IDC
IoT Vision in 2020

IoT connections within EU28
6B Units
€1,181B Revenues

All EU countries will gain from the IoT revolution (Top 3: UK, FR, DE)
IoT will impact all sectors (Top 3: Manufacturing, Finance, and Utilities)

EU IoT Industry Ecosystem

An industry ecosystem (components vendors, suppliers creating solutions, service providers, and enterprise users in all sectors of the economy) will have emerged and will measure € billions in Europe alone.

Cloud Computing  IoT Technologies  Big Data

Cloud computing and Big Data/analytics will be central elements of, and key contributors to, enabling the growth of the European and worldwide IoT ecosystems.

Towards hyperconnected society and economy

Security  Trust  Open Standards  SMEs participation  Time and cost savings  Privacy

Interoperability  Digital Single Market  Innovation
It will expand with yearly growth rates over 20% in value between 2013 and 2020.

The number of IoT connections within the EU28 will increase from approximately 1.8 bn in 2013 (the base year) to almost 6 bn in 2020. IoT revenues in the EU28 will increase from more than €307 bn in 2013 to more than €1,181 bn in 2020, including HW, SW and services.
IoT Smart Environments

A new concept to understand the complexity

Identified Smart Environments

- Smart Energy/Utilities
- Smart Transport
- Smart Manufacturing
- Smart Health
- Smart Government/Environment
- Smart Homes
- Smart Customer Experience
- Smart Finance

Smart Environments → Business Opportunities
Smart Environments & Business Opportunities: Comparative Assessment

Source: IDC, 2014

CAGR 2014-2020

Relative Size of IoT Spending (2020)

Source: IDC, 2014
Thank You!

Gabriella Cattaneo
IDC European Government Consulting
gcattaneo@idc.com