

KAOSTAN FIRSATA

From Chaos to Opportunity

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Lotus. software

WebSphere. software

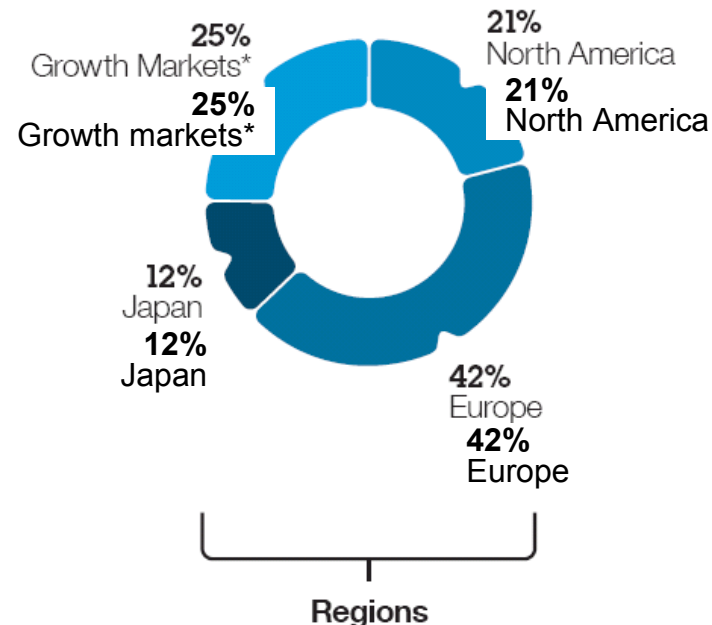
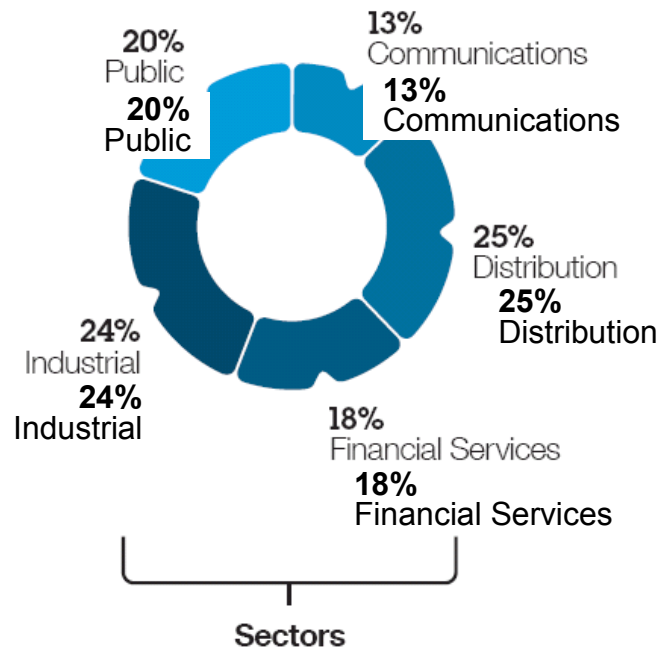
Information Management. software

Rational. software

Tivoli. software

In this largest known sample of face-to-face CEO interviews, we spoke with over 1,500 CEOs and public sector leaders

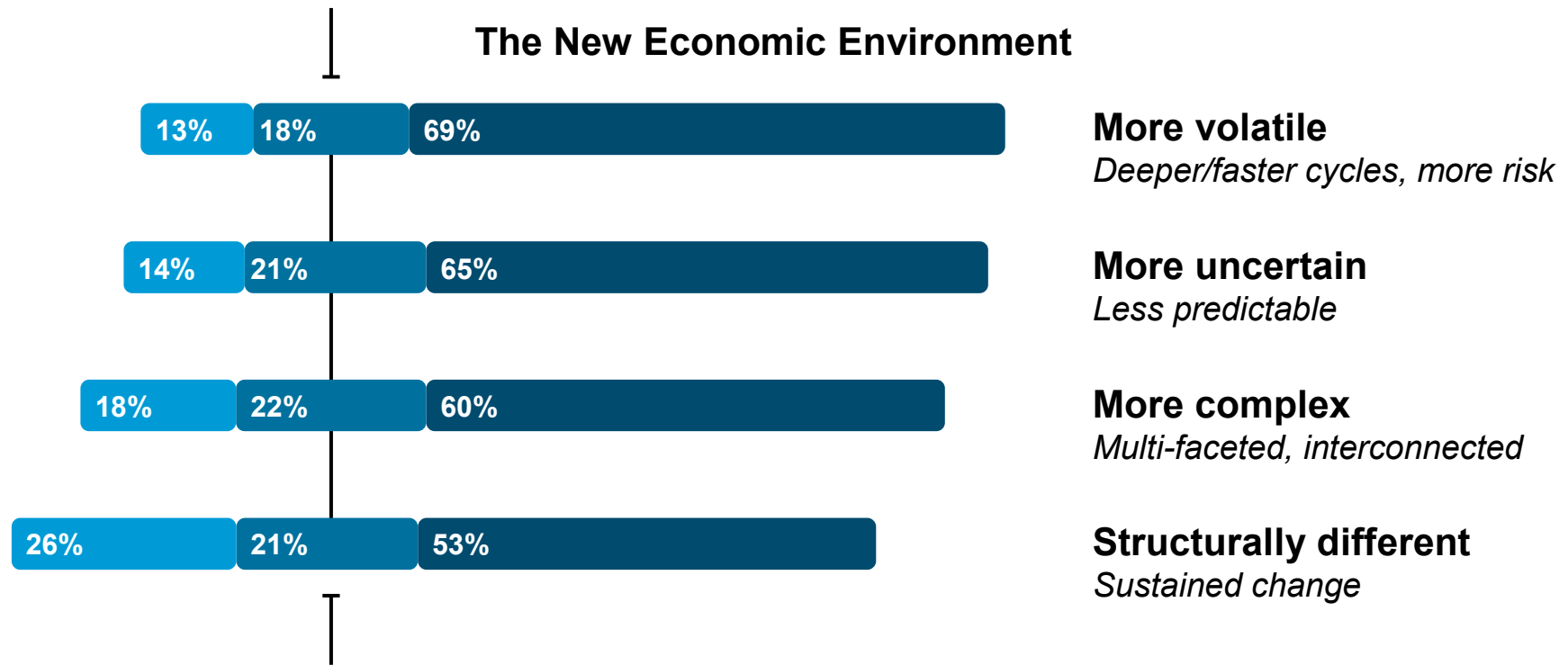
The study represents organizations in 60 countries and 33 industries



Note: The CEO response sample has been weighted based on 2008 Actual Regional GDP of the IMF World Economic Outlook, October 2009;

* Growth Markets include Latin America, Asia Pacific (excluding Japan), Middle East and Africa

Vast majority of CEOs experience the New Economic Environment as distinctly different



“Last year’s experience was a wake-up call, like looking into the dark with no light at the end of the tunnel.”

President and CEO,
Industrial Products, The Netherlands

■ Not at all/to a limited extent
 ■ To some extent
 ■ To a large/very large extent

Source: Q7 To what extent is the new economic environment different? Volatile n=1,514; Uncertain n=1,521; Complex n=1,522 ; Structurally different ,

The need for progress is clear



U\$
170 B

Kilowatt-hours wasted each year by consumers due to insufficient power usage information.



6X

Increase in global water usage since the 1900s, twice the rate of human population growth



U\$ 3,7B

lost hours

U\$ 2,3B

billion gallons of gas

Annual impact of congested roadways in the U.S. alone.



U\$
40B

Annual consumer product and retail sales lost due to supply chain inefficiencies



U\$
4T

Average daily volume in the world's currency markets

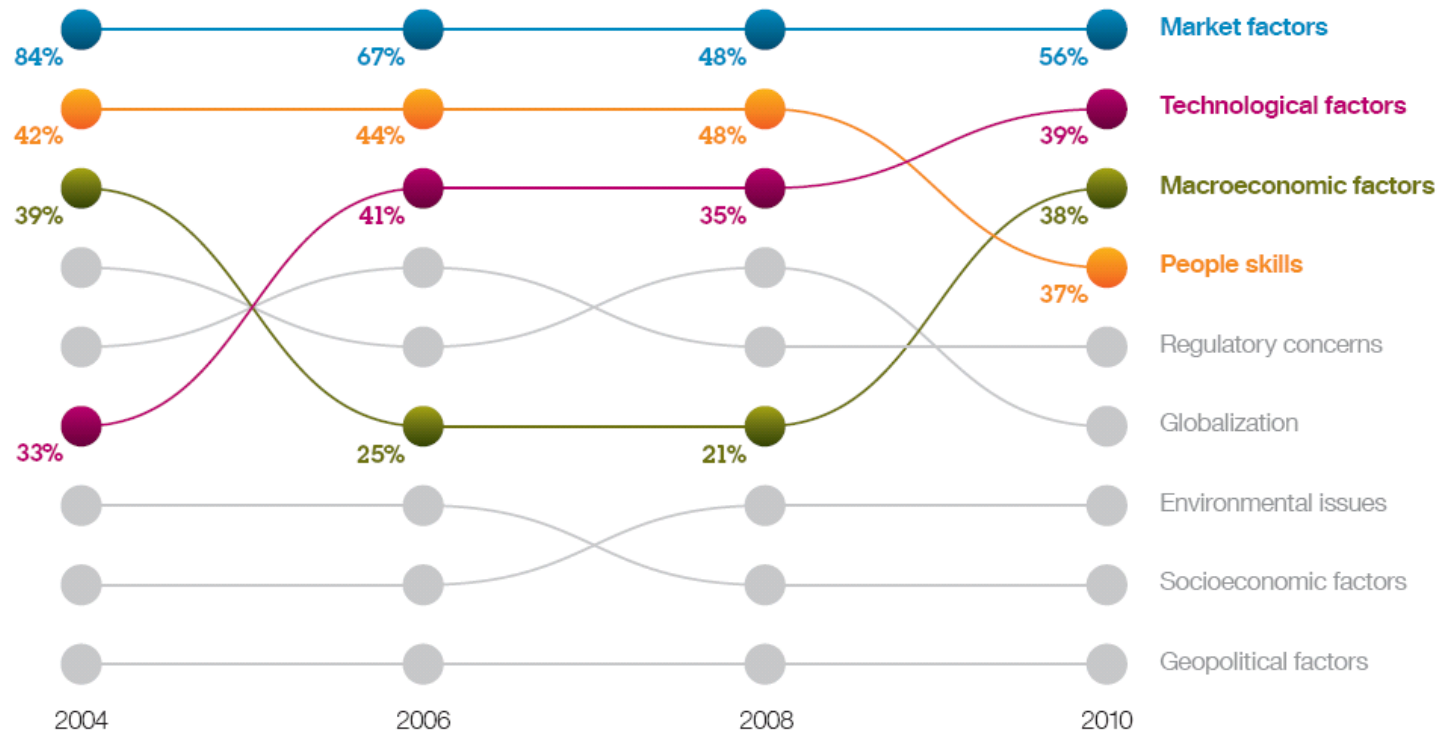
Continued rise of technology as key external factor for CEOs

Three most important “external” forces over the next three years

56%
say market factors

39%
say technological factors

38%
say macroeconomic factors




Source: Q1 What are the 3 most important “external” forces that will impact your organization over the next 3 years? n=1,538


The world is becoming more instrumented, interconnected and intelligent resulting in an explosion of information...



Volume
988 exabytes: The amount of digital information that will exist in 2010.
30 Billion RFID tags
2 Billion people on the web



Variety
80% of new data growth is generated largely by email, with increasing contribution by documents, images, and video and audio.



Velocity
77% of executives say they do not have real-time information to make key business decisions.

Source: Various IBM and Public Studies

Yet Many Organizations are Operating with Blind Spots...

1 in 3

Business leaders **frequently make decisions** based on information they don't trust, or don't have

\$5.7M USD

Lost time **reformatting information** between applications

1 in 2

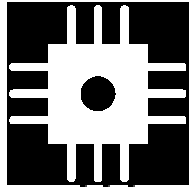
Business leaders say **they don't have access to the information they need** to do their jobs

\$5.3M USD

Lost time **searching for the right information**

Annual cost per 1,000 knowledge workers

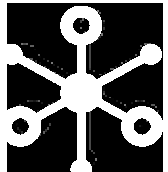
Sources: IBM: Break Away with Business Analytics and Optimization Study; IDC



Our world is becoming
INSTRUMENTED



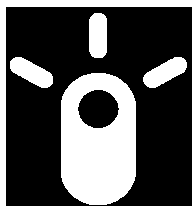
By 2010, 30B RFID tags will be embedded in our world and across entire ecosystems.



Our world is becoming
INTERCONNECTED



An estimated 2B people will be on the Web by 2011 and a trillion connected objects – cars, appliances, roadways, pipelines – comprising the “Internet of Things.”



All things becoming
INTELLIGENT



Every day, 15 petabytes of new information are being generated. This is 8x more than the information in all U.S. libraries.

Four key themes

Business Optimization

“Data is exploding and it’s in silos”

I Need Insight

Smart Work

New business and process demands”

I Need to Work Smart

Green and Beyond

“Our resources are limited”

I Need Efficiency

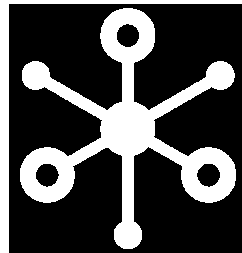
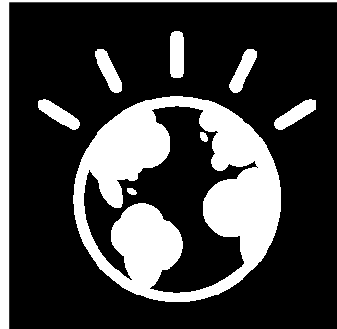
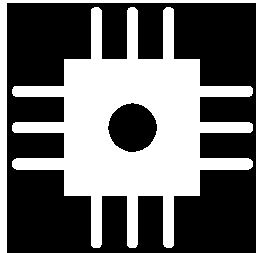
Dynamic Infrastructure

My infrastructure is inflexible and costly”

I Need to Respond Quickly



IBM is working across industries to make our planet smarter



NEW INTELLIGENCE

GREEN & BEYOND

**DYNAMIC
INFRASTRUCTURE**

SMART WORK

- BANKING & FINANCIAL MARKETS
- CHEMICALS & PETROLEUM
- ELECTRONICS
- ENERGY & UTILITIES
- GOVERNMENT & EDUCATION
- HEALTHCARE & LIFE SCIENCES
- RETAIL & CONSUMER PRODUCTS
- TELECOM
- TRANSPORTATION

Organizations are Applying Information and Analytics Today to Optimize Performance

Challenge

- Understand strength of relationship with 100 Million Subscribers (3 Billion calls/day) supported by 1.3M retailers
- Target new customers in rural India; sell add'l services to existing customers
- Manage investments for rapid growth

Solution

- A flexible platform for centralized management of information; deliver localized, targeted offers and services.
- IBM Hardware, Software, Services

Business Benefits

- Information and applied analytics drive more informed real-time decisions and actions
 - My Airtel, My Offers – optimized plans unique to a customer
- Processing 3 to 4 million new customers each month - time to activate new accounts reduced by 90%
- Business processes and infrastructure optimized through predictive capabilities



Essentials for the next generation leaders



Global collaborators



Shaped like a T

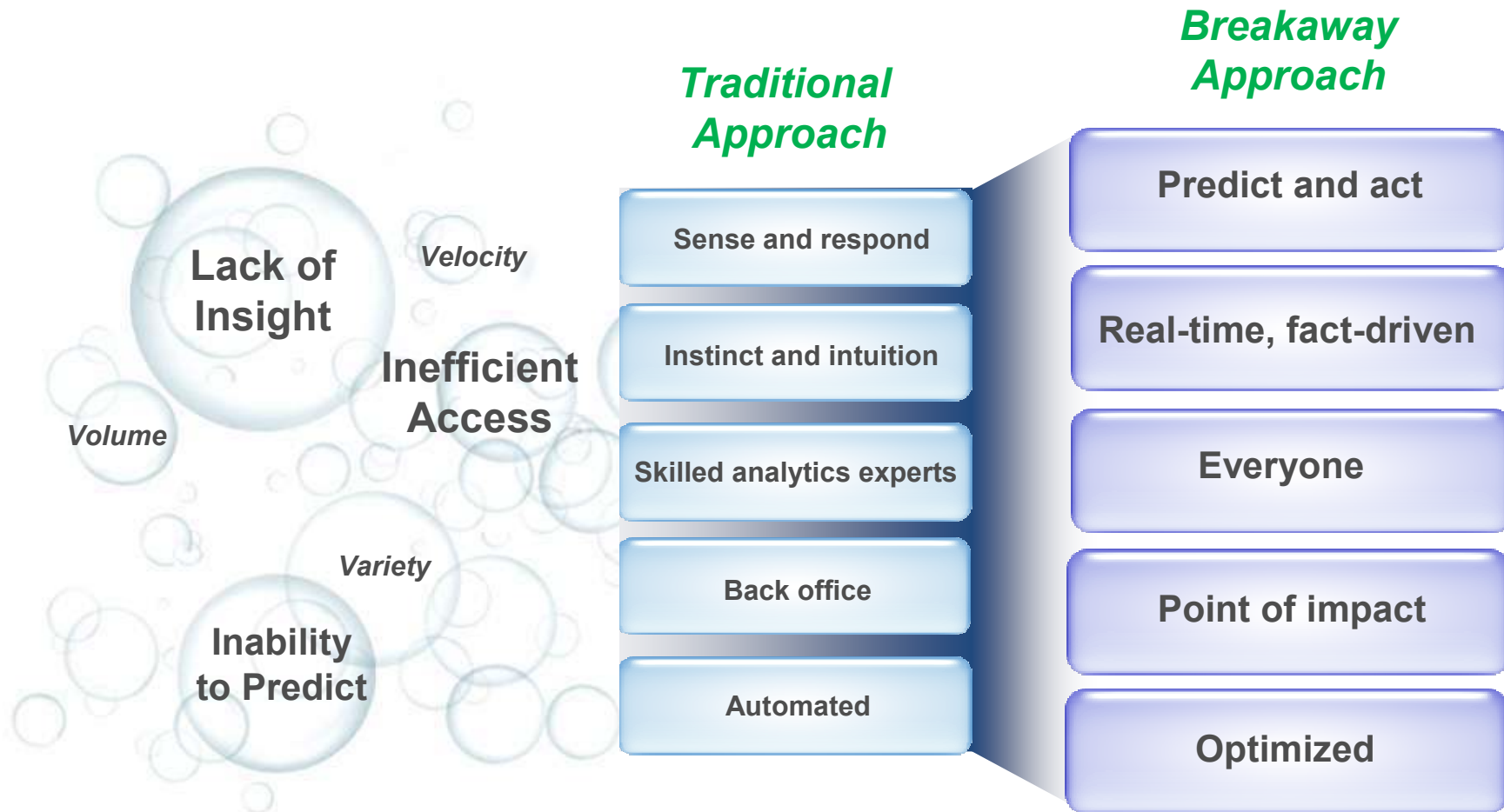


Factual-based decision-makers



Build the Intelligent Enterprise

Leverage the new computing model to discover new ways to optimize decision making and actions ...



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Teşekkür ederim !