DIH
Digital Innovation Hub
Udine

CONFINDUSTRIA UDINE
Gruppo Telecomunicazione e Informatica

DITEDI
DISTRETTO DELLE TECNOLOGIE DIGITALI
CLUSTER REGIONALE ICT FRIULI VENEZIA GIULIA

6 MAGGIO 2020 ORE 17.00

WEBINAR

YES, WE CAN CHANGE!
SCENARI E PROSPETTIVE PER L'ECONOMIA DEL FVG POST EMERGENZA

Appendix: Gartner at a Glance

Gartner.

Gartner at a Glance

About Gartner

- The world's leading research and advisory company, **founded in 1979**
- **Nearly 17,000 associates** in 120+ offices around the world
- **$4.2B** revenue in 2019
- 40+ consecutive quarters of **double-digit contract value growth**
- Member of the **S&P 500**
- Deep global **business and technology** insight into every major function in the enterprise:

Customer Service & Support	Finance	Human Resources	Information Technology	Legal & Compliance	Marketing & Communications	Product Management	Research & Development	Sales	Strategy	Supply Chain

Clients we serve

- **More than 15,000 client enterprises** in more than 100 countries
- **C-suite leaders and their teams** across all enterprise functions in every industry around the world
- Enterprises **large and small, in public and private sectors,** including 77% of the Global 500

3   *SEC-reported data as of 31 December 2019. Other data collected between then and 2 April 2020.

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Gartner at a Glance

Trusted insights

- Developed through rigorous proprietary research methodologies to ensure our insights are **independent and objective**
- Created by a global team of **2,250+ research and advisory experts** who understand your role, business and industry
- Complemented by **peer perspectives and advice** accessed through:
  - The **Gartner Peer Connect client community** of nearly 72,000 active participants from every enterprise function
  - **Worldwide destination conferences plus virtual live and recorded events** tailored for specific executives and their teams
  - The **Gartner Peer Insights public community,** where 150,000+ enterprise IT users have shared more than 330,000 online reviews covering more than 8,000 IT products and services
- **Quoted by leading business publications worldwide** an average of 70 times every week

Strategic advice

- Delivered in **more than 400,000 client interactions each year**
- Provided by **experts, many of whom are former practitioners,** to help challenge conventional thinking and accomplish critical activities
- Informed by an **annual average of 300+ new, thoroughly vetted practitioner-sourced case studies**
- Applied in **2,500+** technology-driven strategic consulting and contract optimization engagements annually with CIOs and other senior executives through our Consulting business

Practical tools

- Gartner Score maturity diagnostics that cover **more than 45 functional areas across the enterprise** and apply a consistent methodology that uniquely factors capability and organizational importance
- **130+ Gartner Magic Quadrants,** a standard for objective market analysis covering more than 900 technology and technology service vendors
- **100+ new Gartner Ignition Guides** produced in 2019 for accelerating team execution of initiatives in nearly every enterprise function
- Gartner TalentNeuron™ combines big data and statistical insights to provide **global talent, location and competitive intelligence** for making better short- and long-term talent decisions
- The Gartner Digital IQ index, including reports on the **performance of 2,000+ brands benchmarked across thousands of data points** covering four dimensions of digital performance: Social media, mobile, digital marketing, and site and e-commerce

To learn more about how Gartner works with leaders to drive organizational performance, visit gartner.com.

*SEC-reported data as of 31 December 2019. Other data collected between then and 2 April 2020.

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«Digitale»
Prospettive Globali, Conseguenze Locali

Fabrizio Biscotti
VP Analyst
@fab_biscotti

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Digital Transformation Programs Are Still Rising

62% 2018

82% 2019
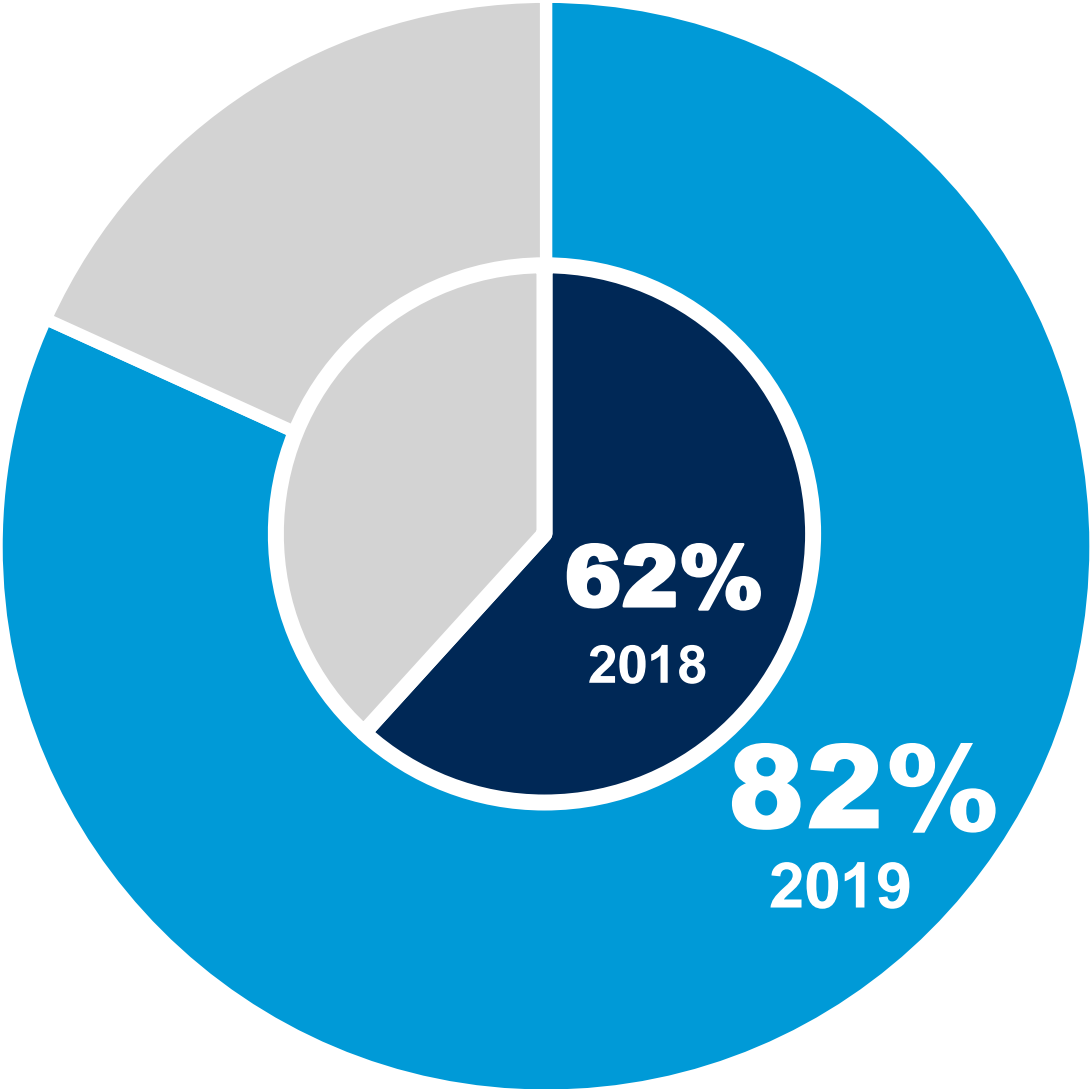
Base: All respondents, n = 473
Do you have a management initiative or transformation program to make your business more digital?

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«Digitale» Prospettive Globali, Conseguenze Locali

1. Principali trend tecnologici nel 2020

2. Cosa ne pensano gli Amministratori Delegati ed i CIO

3. Alcuni andamenti del mercato IT di cui tener conto

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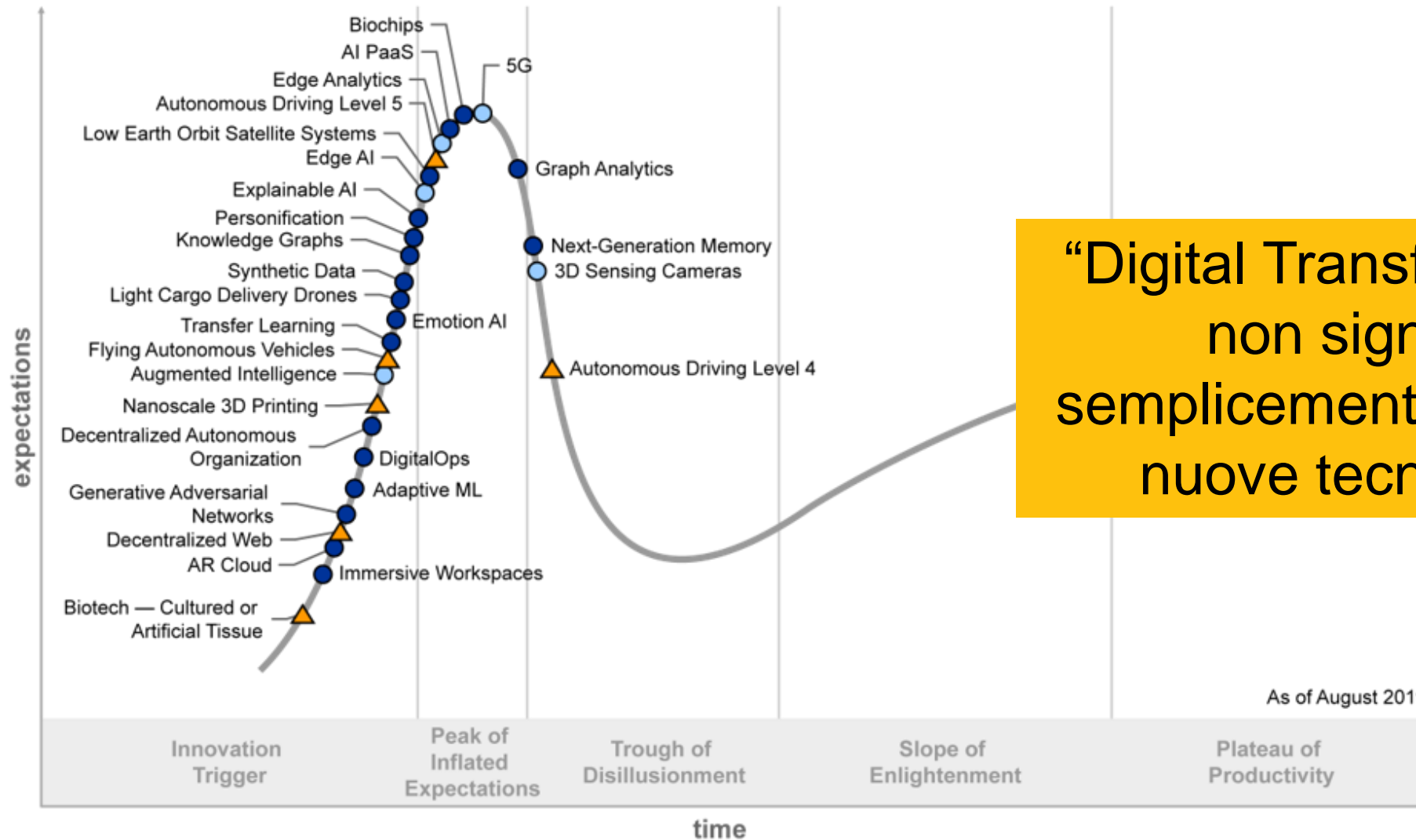3. Alcuni andamenti del mercato IT di cui tener conto

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Hype Cycle for Emerging Technologies, 2019

expectations

Biochips
AI PaaS
Edge Analytics
Autonomous Driving Level 5
Low Earth Orbit Satellite Systems
Edge AI
Explainable AI
Personification
Knowledge Graphs
Synthetic Data
Light Cargo Delivery Drones
Transfer Learning
Flying Autonomous Vehicles
Augmented Intelligence
Nanoscale 3D Printing
Decentralized Autonomous Organization
Generative Adversarial Networks
Decentralized Web
AR Cloud
Biotech — Cultured or Artificial Tissue

5G
Graph Analytics
Next-Generation Memory
3D Sensing Cameras
Emotion AI
Autonomous Driving Level 4
DigitalOps
Adaptive ML
Immersive Workspaces

As of August 2019

| Innovation Trigger | Peak of Inflated Expectations | Trough of Disillusionment | Slope of Enlightenment | Plateau of Productivity |

time

"Digital Transformation" non significa semplicemente adottare nuove tecnologie!

Plateau will be reached:

○ less than 2 years   ● 2 to 5 years   ● 5 to 10 years   ▲ more than 10 years   ⊗ obsolete before plateau

Source: Gartner
ID: 370466

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Hyperautomation

The goal of hyperautomation is to automate anything that can be automated.

The No. 1 use case for AI is process automation.

Source: "AI Use Cases, Tales From the Trenches: A Gartner Trend Insight Report" (G00373320)

The Pathway to Ambient Multiexperience

← Smell — Taste — Sight — Sound — Touch — **Multisensory and Multimodal** — Radar — Humidity — Location — Emotion →

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Democratization

By 2020, automation of data science tasks will enable **citizen data scientists** to produce a higher volume of advanced analysis than expert data scientists.

Source: "Predicts 2019: The Democratization of AI" (G00376162); Source: "Four Real-World Case Studies: Implement Augmented DSML to Enable Expert and Citizen Data Scientists" (G00390289)

Human Augmentation

By 2023, the number of people with disabilities employed will triple due to AI and emerging technologies reducing barriers to access.

Through 2023, 30% of IT organizations will extend BYOD policies with "bring your own enhancement" (BYOE) to address augmented humans in the workforce.

Source: "Maverick* Research: Architecting Humans for Digital Transformation" (G00389205)

Image Source: Ford: EksoVest is the latest example of advanced technology Ford is using to reduce the physical toll on employees during the vehicle assembly process, lessening the chance of worker fatigue, injury or discomfort

Transparency and Traceability

Explainable AI describes a model, highlights its strengths and weaknesses, predicts its likely behavior and identifies any potential biases to enable accuracy, fairness, accountability, stability and transparency in algorithmic decision making.

Empowered Edge

By year-end 2023, more than 50% of large enterprises will deploy at least six edge computing use cases deployed for IoT or immersive experiences, versus less than 1% in 2019.

By 2023, there will be over 40 billion processors worldwide with only a small proportion will in corporate IT systems.

Source: "Exploring the Edge: 12 Frontiers of Edge Computing" (G00388219)

Autonomous Things

By 2028, Level 3-and-above-capable autonomous driving net additions will rise to 2.5 million from 137,000 in 2018 (a CAGR of 34%).

Source: "How to Assess Opportunities in Autonomous Things" (G00402843)

Autonomous Things

Robots

Drones

Vehicles/Ships/Aircraft

Appliances

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Practical Blockchain

By 2023, blockchain inspired technology will support the global movement and tracking of $2 trillion of goods and services annually.

Source: "Predicts 2019: Blockchain Business" (G00374378)
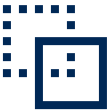
AI Security

Through 2022, 30% of all cyberattacks will leverage training data poisoning, AI model theft or adversarial samples.

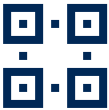Source: "Anticipate Data Manipulation Security Risks to AI Pipelines" (G00373743)

The Top 10 Strategic Technology Trends for 2020

People-Centric	Smart Spaces
Hyperautomation	Empowered Edge
Multiexperience	Distributed Cloud
Democratization	Autonomous Things
Human Augmentation	Practical Blockchain
Transparency and Traceability	AI Security

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The Changing role of the CIO...

CEO

Industry-Specific
(many)

Finance

Marketing

HR

Sales

Supply Chain

Customer
Service

CIO

Procurement
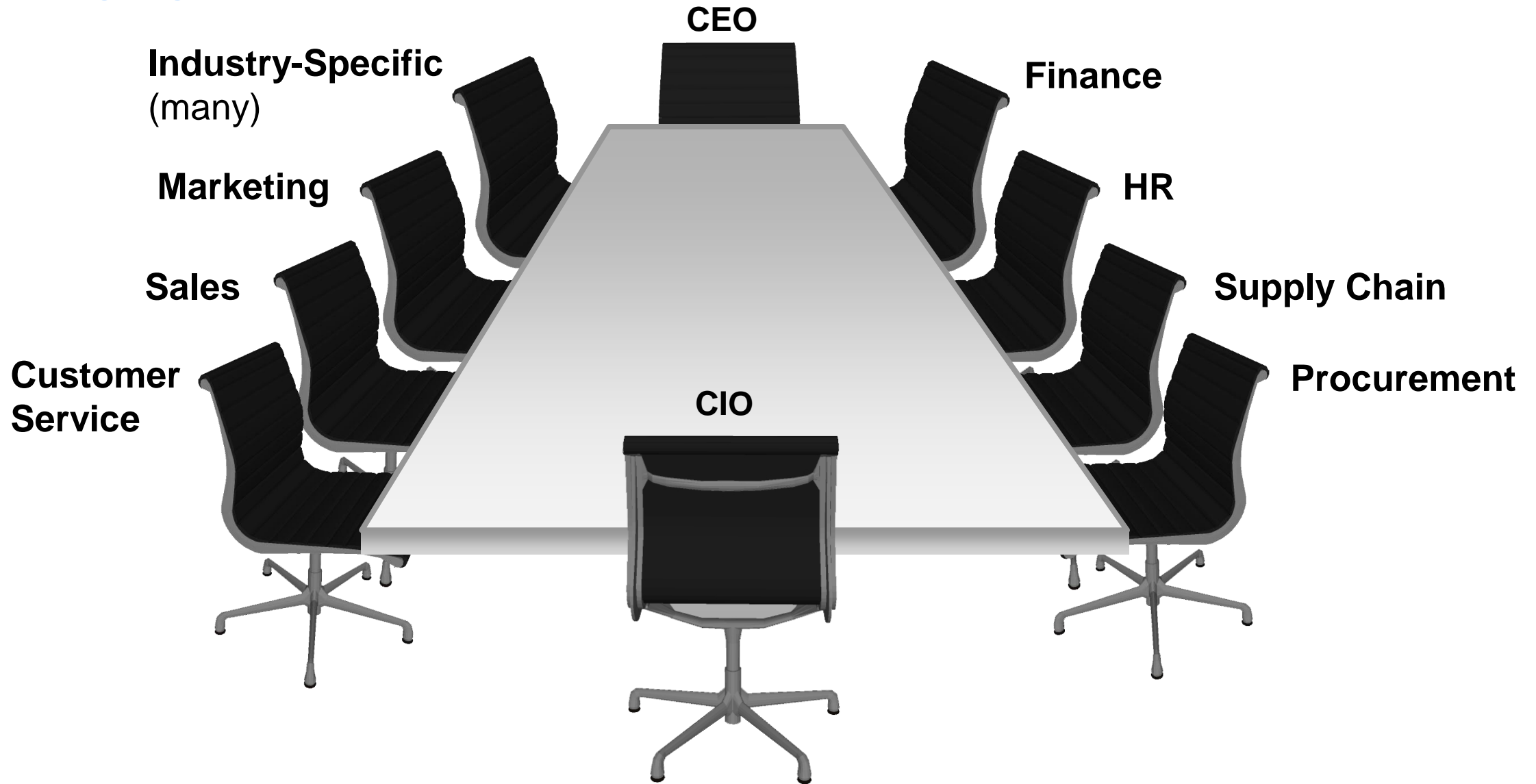
From Servicing the Various Business Functions ...

CEO

Industry-Specific (many)

Finance

Customer Service

Marketing

HR

Sales

Procurement

Supply Chain

CIO

...To Helping the Business Investing in Technology

The Gartner CEO Survey

(473 Global CEOs)

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Top 11 Strategic Business Priorities for 2019/2020

Percentage of respondents: Ranked by summary top 3 mentions

Degree of increase from prior year

Degree of decrease from prior year

53%
Growth (Simple)

32%
IT Related

Corporate (Structural Development)
31%

23%
Financial

Workforce
21%

Customer
15%

Product Improvements
15%

12%
Cost Management

Efficiency and Productivity
8%

8%
Innovation

7%
Risk Management

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What About the 'D' Word for Growth?

Percent who used the word
"Digital"
when describing their top
five **business** priorities

Year	Value
2012	2.1%
2013	4.1%
2014	1.5%
2015	5.5%
2016	8.3%
2017	10.3%
2018	13.4%
2019	18.6%

Base: All respondents, n = 473

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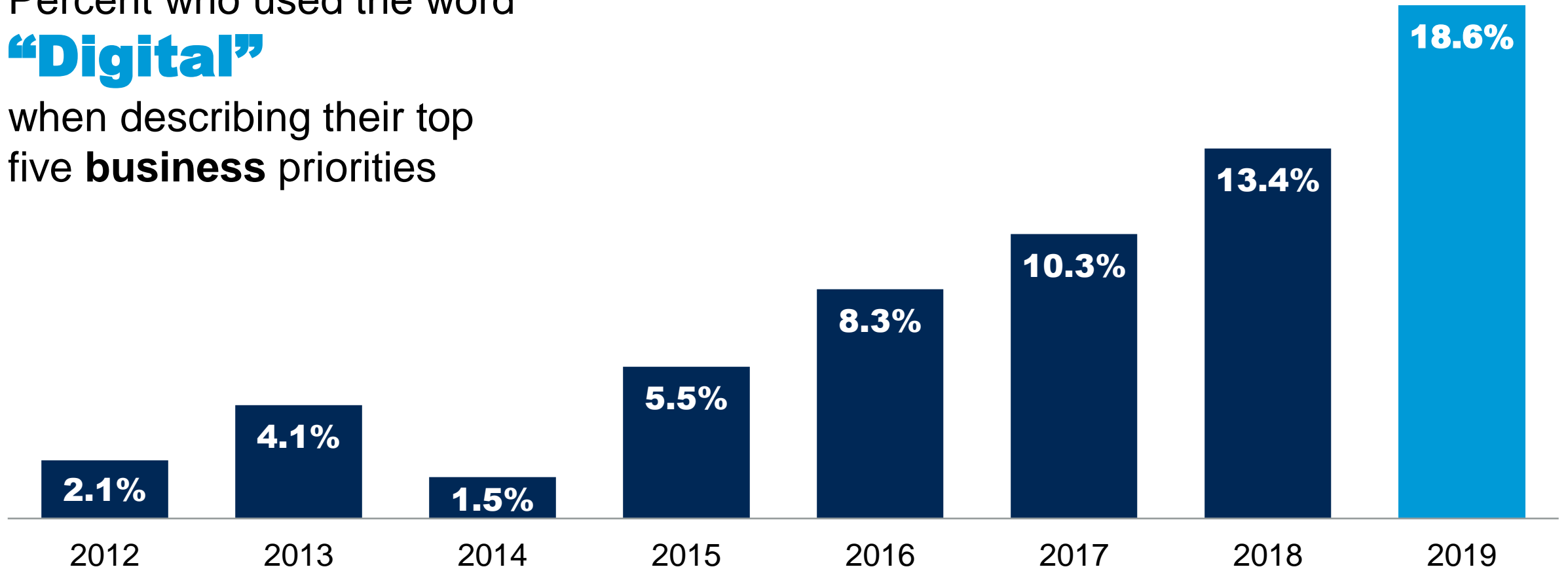
When Asked to Consider "Productivity and Efficiency" — Tech Is the No. 1 Tool

Top ways organization will improve productivity/efficiency

Percentage of respondents. **Ranked by summary top 2 mentions**

| 47% | 46% | 37% | 15% | 5% | | | 11% | |
| Technology enablement | Operations changes | People and organisation changes | Value chain improvements | Org redesign | Consolidation /Integration | Product redesign | Other | No answer |

No significant difference

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The Gartner CIO Survey

(3102 Global CIOs)

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Meet your customers: the CIO Survey

| **3102** CIOs | **89** Countries | **$15T** Revenue | **$284B** IT Spend |

■ Overall Total

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Of Italy-Based Respondents, 62% Were Large Enterprises

(More than $1 billion in revenue)

| 95 CIOs | 14 Industries | $514B Revenue | $19.6B IT Spend |

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"Digital" Has Become Business as Usual

Stage of digital maturity (percentage of EMEA respondents)
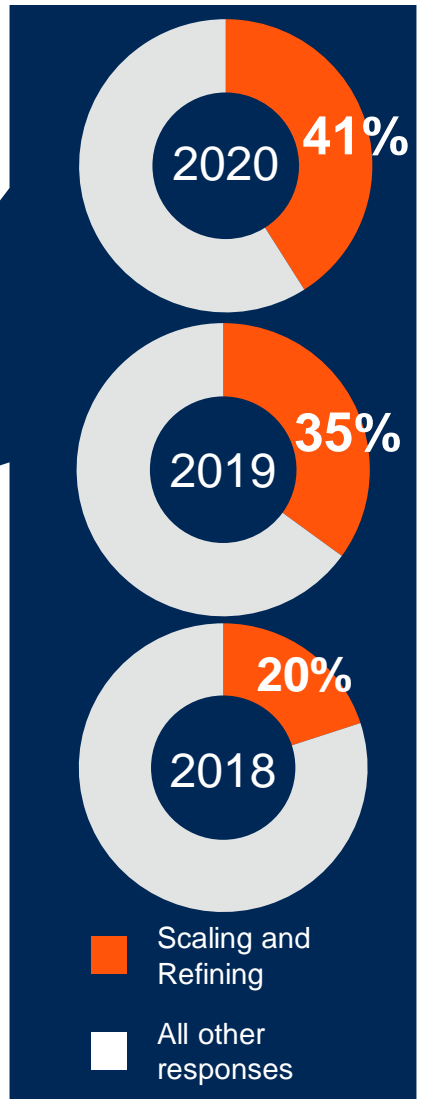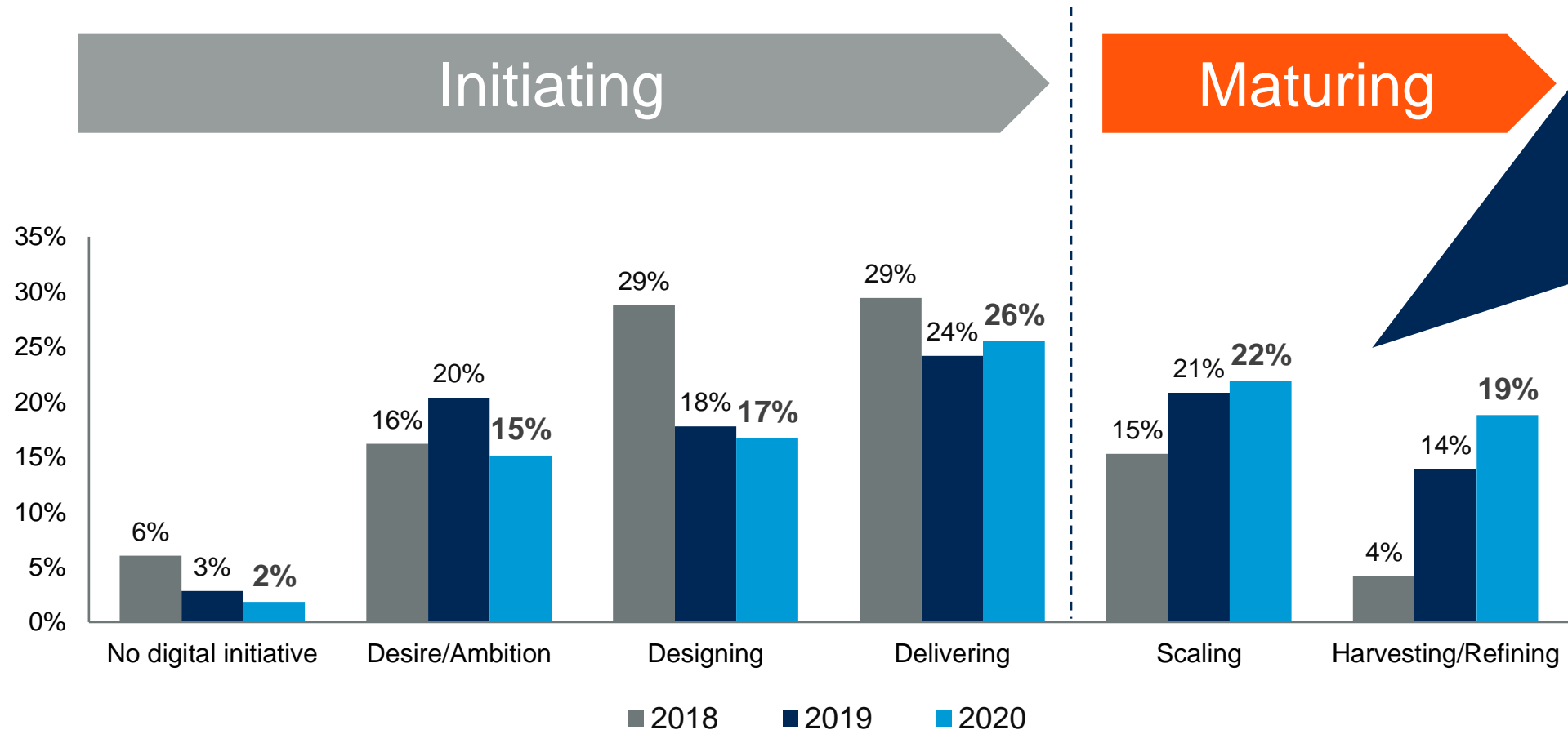
Initiating | Maturing

Chart data (2018, 2019, 2020):
- No digital initiative: 6%, 3%, 2%
- Desire/Ambition: 16%, 20%, 15%
- Designing: 29%, 18%, 17%
- Delivering: 29%, 24%, 26%
- Scaling: 15%, 21%, 22%
- Harvesting/Refining: 4%, 14%, 19%

Legend: 2018, 2019, 2020

Donut charts (Scaling and Refining):
- 2020: 41%
- 2019: 35%
- 2018: 20%

Legend: Scaling and Refining / All other responses

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Anticipating Shifts In IT Investment

Percentage of respondents decreasing investment | **Percent of respondents increasing investment**

IT Project Budget

Category	Decreasing	Increasing
Application Modernization	27%	48%
Process Improvement	27%	46%
Analytics	16%	46%
Core/Foundational Infrastructure	31%	44%
Data and Information Strategy	19%	43%
Security & Compliance	29%	43%
Customer Interface - Ease of Use and Personalization	24%	40%

IT Budget by Functional Areas

Category	Decreasing	Increasing
Outsourcing (exclude. Transmission)	26%	38%
Occupancy/Facilities	6%	21%
Software	20%	18%
Personnel Salaries and Benefits	21%	18%
Software as a Service (SaaS)	7%	17%
Hardware	23%	14%
Infrastructure as a Service (IaaS)	1%	11%
Network Transmission	17%	9%
Other Public Cloud Services	5%	5%

IT Budget by Asset Category

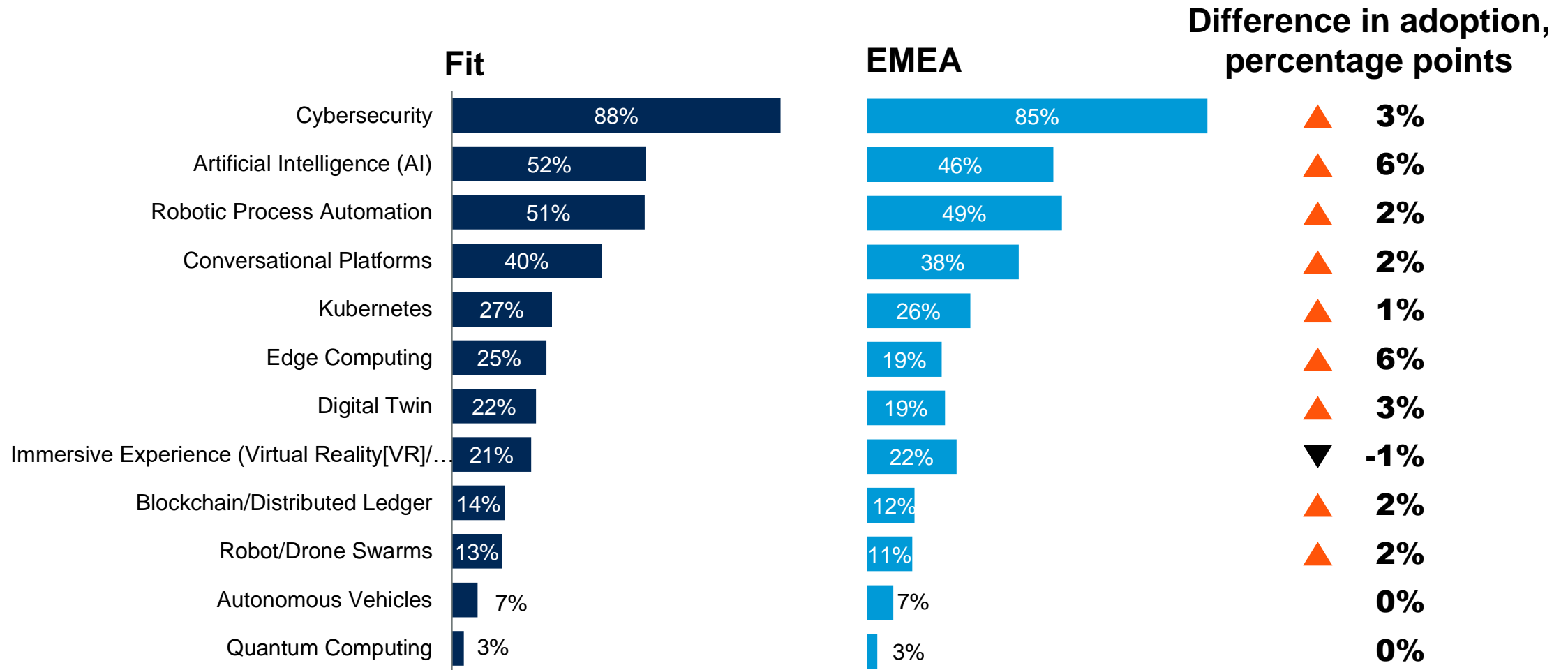| Category	Decreasing	Increasing
Application Support	23%	54%
Corporate IT Management, Finance & Administration	23%	54%
End-User Computing	24%	53%
Data Center	28%	51%
Voice & Data Network	30%	48%
IT Service Desk	30%	47%
Application Development	30%	46%

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95%

of CIOs expect cybersecurity threats to get worse

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Anticipating Emerging Trends

Percentage of respondents who have already deployed or plan to deploy a technology in next 12 months

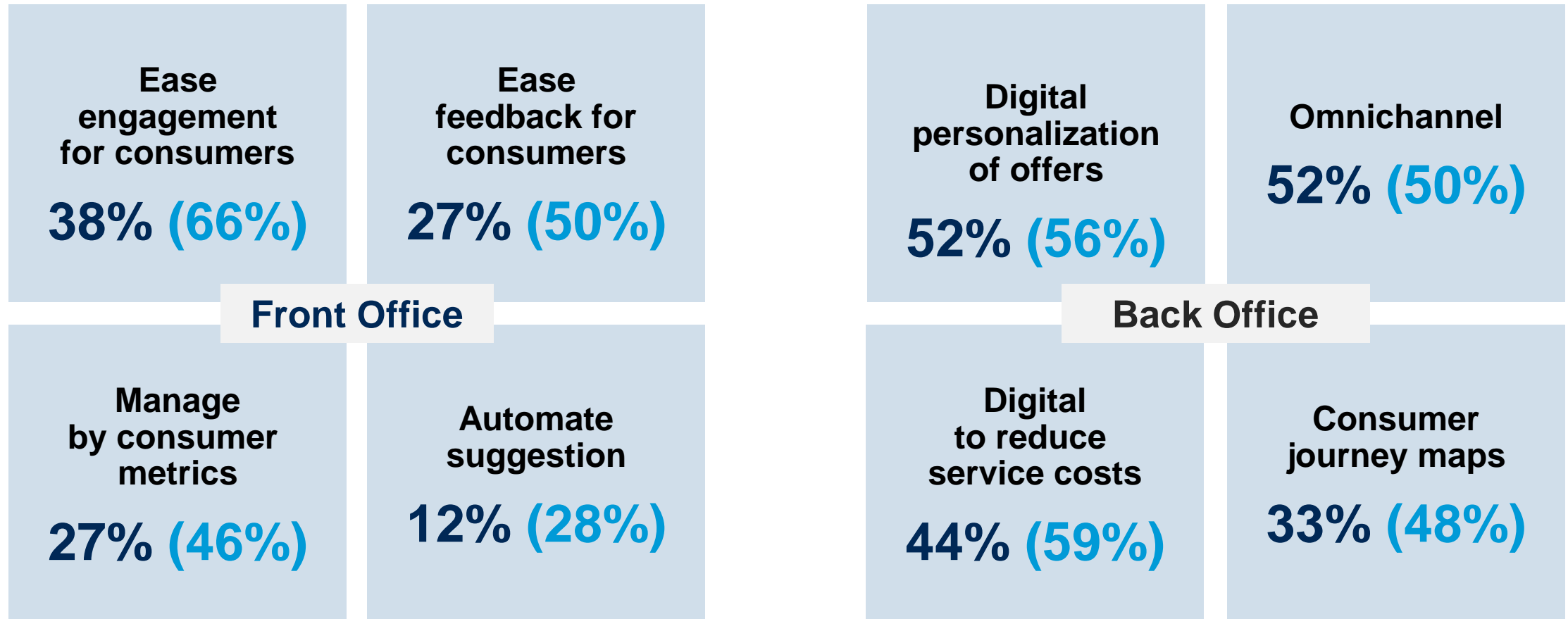**Fit** **EMEA** **Difference in adoption, percentage points**

	Fit	EMEA	Difference
Cybersecurity	88%	85%	▲ 3%
Artificial Intelligence (AI)	52%	46%	▲ 6%
Robotic Process Automation	51%	49%	▲ 2%
Conversational Platforms	40%	38%	▲ 2%
Kubernetes	27%	26%	▲ 1%
Edge Computing	25%	19%	▲ 6%
Digital Twin	22%	19%	▲ 3%
Immersive Experience (Virtual Reality[VR]/...	21%	22%	▼ -1%
Blockchain/Distributed Ledger	14%	12%	▲ 2%
Robot/Drone Swarms	13%	11%	▲ 2%
Autonomous Vehicles	7%	7%	0%
Quantum Computing	3%	3%	0%

Q: What are your organization's plans in terms of the following digital technologies and trends?
Fit n = 218, EMEA n = 381

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Too Much Focus on Back Office, Not Enough on Customer Experience

Front Office

Ease engagement for consumers
38% (66%)

Ease feedback for consumers
27% (50%)

Manage by consumer metrics
27% (46%)

Automate suggestion
12% (28%)

Back Office

Digital personalization of offers
52% (56%)

Omnichannel
52% (50%)

Digital to reduce service costs
44% (59%)

Consumer journey maps
33% (48%)

■ Italy (n = 81)   ■ Top Performers (n = 232)

Q. Where is your organization as a whole focusing its efforts to improve consumer experience?
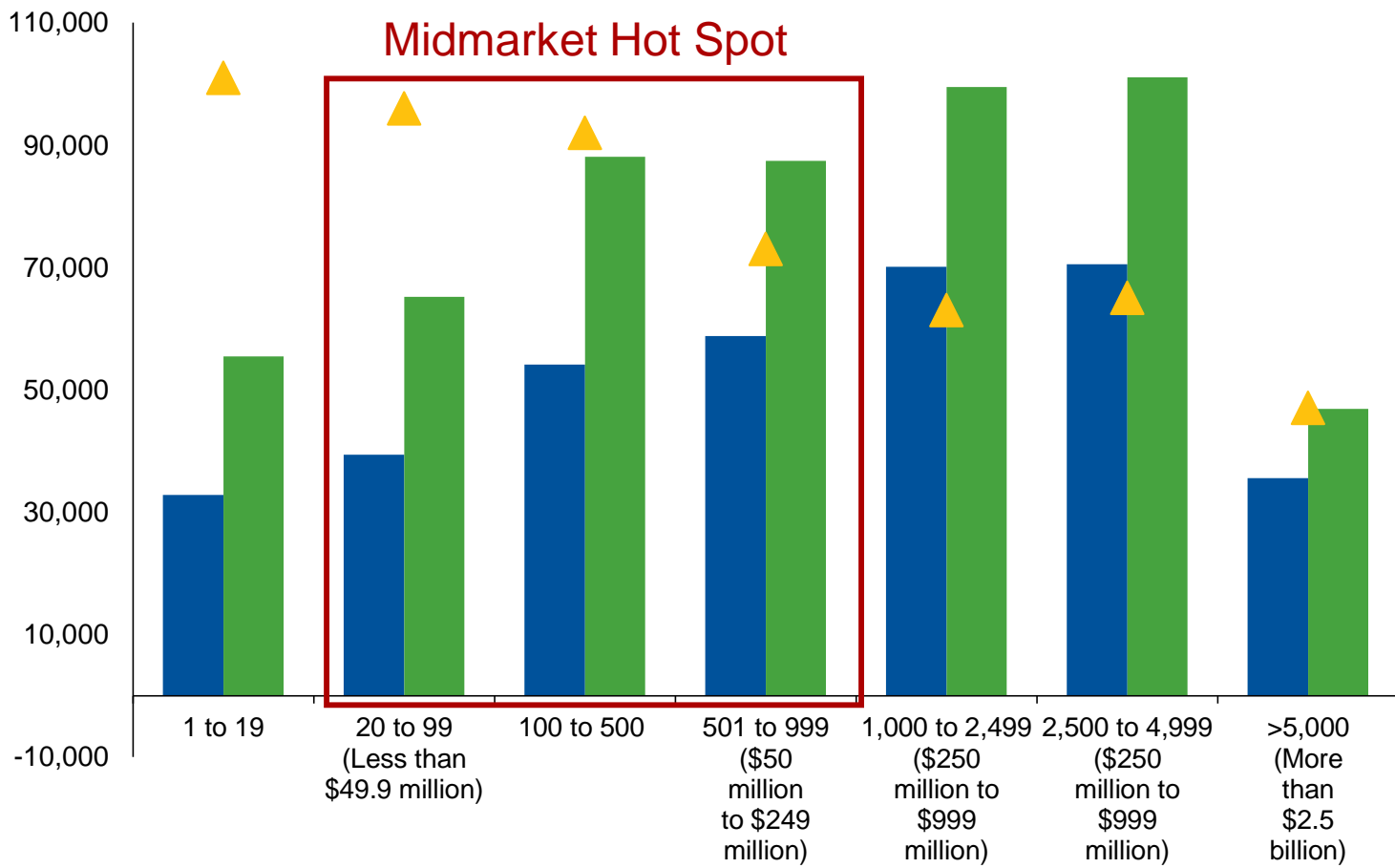
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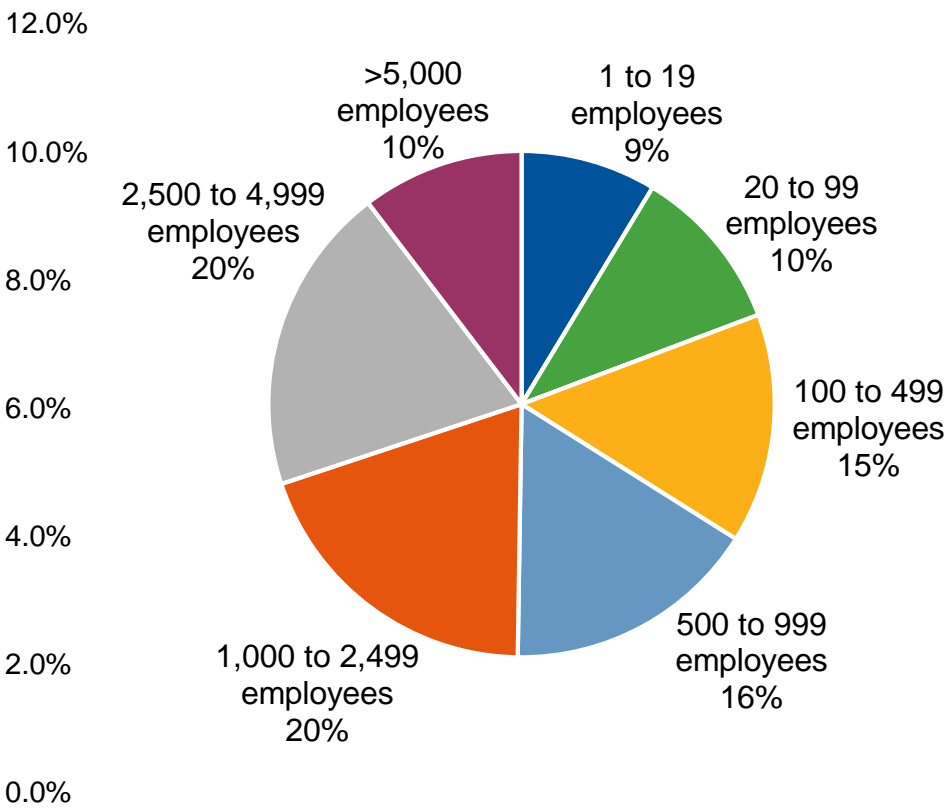Enterprise Software Spending by Company Size: The Midmarket Is a Key Area of Investment

Source: "Forecast: Small-and-Midsize-Business IT Spending, Worldwide, 2016-2022, 4Q19 Update"
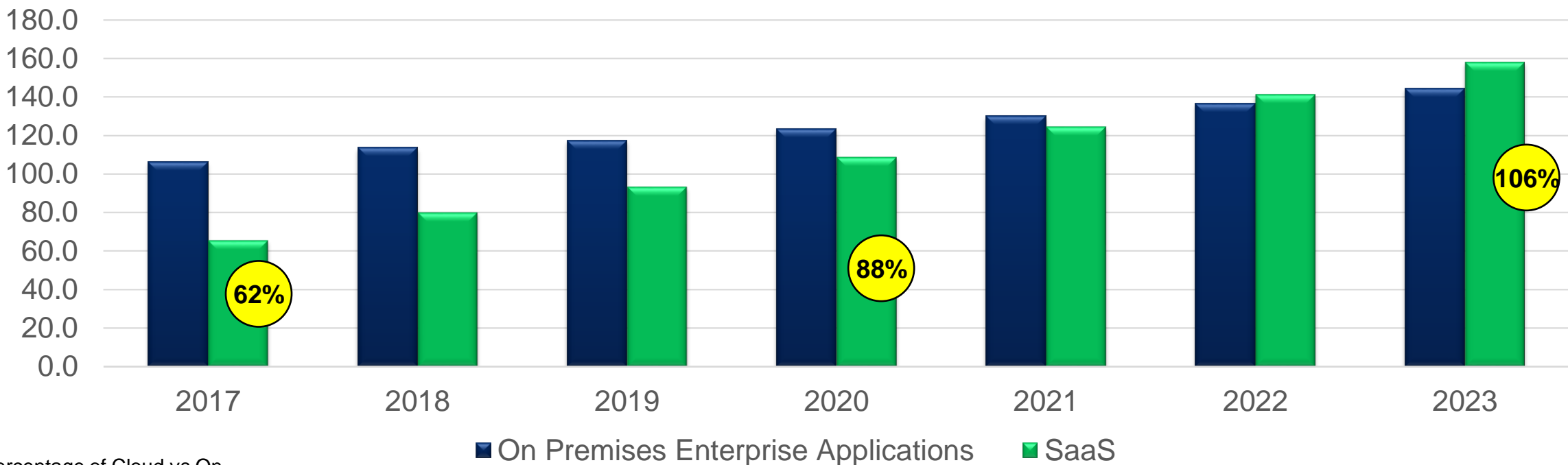
The Cloud Shift: the example of "SaaS"

$65 Billion
(2017)

→ $157 Billion
(2023)

15%
(CAGR 2018-2023)

SaaS vs On Premises Applications (License & Maintenance)

■ On Premises Enterprise Applications ■ SaaS

% Percentage of Cloud vs On-Premises

Source: Forecast: Enterprise Software Markets, 4Q2019 & Forecast: Public Cloud Services, Worldwide, 4Q19

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