Welcome to the 3rd Platform’s 2nd Chapter
The Digitized Economy, Digital Native Enterprises & the New IT World Order

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The Big Picture
A New Chapter
Key Technologies
Reinvented IT Org
New IT World Order
The Big Picture

A New Chapter

Key Technologies

Reinventing the IT Org

New IT World Order
Same Story...

3rd Platform Technologies Dominating

![Chart](chart.png)

Same Story...

3rd Platform Technologies Dominating

Digital Transformation Reaching Scale

IT Spending on Digital Transformation

$1.3T  2018  $2.1T  2021

By 2021, at least 50% of global GDP will be digitized, with growth in every industry driven by digitally-enhanced offerings, operations and relationships.
Digital Transformation Reaching Scale

By 2021, **at least 50% of global GDP** will be digitized, with growth in every industry driven by digitally-enhanced offerings, operations and relationships.
"We should all be acting like Amazon’s getting into our business."

- Alex Gorsky, CEO Johnson & Johnson
A New Chapter

Key Technologies

Reinvented IT Org
Chapters of the 3rd Platform

Chapter 1  |  2007+  **EXPERIMENTATION**
- Cloud, Mobile, Social, Big Data Analytics
- Competition: Company-based

Chapter 2  |  2015+  **MULTIPLIED INNOVATION**
- AI, Hyper-agile apps, Blockchain
- Competition: Platform- & Ecosystem-based
- Innovation multiplies, products/services explode
“No matter who you are, most of the smartest people work for someone else.”
(January 1990)

Bill Joy
Co-founder, Sun Microsystems
The Big Picture
A New Chapter
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New IT World Order
Cloud 2.0: Everywhere for Everything...

By 2021, we’ll see a **cloud** world that is...

- **$565B**
- 20% at the **edge**
- over 15% **specialized**
- over 90% **multicloud**
"Multiplying Innovation" Key Technologies

Multiplying Insights

By 2019, 40% of DX initiatives will use AI services; by 2021, 75% of commercial enterprise apps will use AI.

By 2021, hyper-agile architectures will mainstream, with 80% of application development on cloud platforms using microservices and cloud functions.

By 2020, 25% of top global banks, nearly 30% of manufacturers and retailers and 20% of healthcare organizations will use blockchain networks in production.

Multiplying Development

Multiplying Trust
The Reinvention of Enterprise IT
The Reinvention of Enterprise IT

Data-centric | Analytics/AI-intensive

Agile/DevOps Operation & Culture

80% Externally-sourced | API-enabled
The Reinvention of Enterprise IT

Data-centric | Analytics/AI intensive

Agile/DevOps Operation & Culture

80% Externally-sourced | API-enabled

60%+ by 2021
New IT World Order
Restructuring of the IT Industry

Multicloud Integration/Mgt Platforms
Accenture, Deloitte, Capgemini, EVRY, Rackspace, T-Systems, Equinix, DXC, embotics, Verizon, AT&T Business

App-Centric Platforms
Salesforce, SAP, Oracle, Adobe, Microsoft, Intuit, ADP

Mega-Platforms
Amazon, Microsoft, Google, IBM, Oracle, Alibaba Group

Infrastructure Providers
Network Service Providers
Restructuring of the IT Industry

Multicloud Integration/Mgt Platforms

Industry Platforms

App-Centric Platforms

Mega-Platforms

Infrastructure Providers

Network Service Providers
Restructuring of the IT Industry

- Multicloud Integration/Mgt Platforms
  - accenture
  - Deloitte
  - Capgemini
  - Evergy
  - Rackspace
  - T-Systems
  - Equinix
  - DXC Technology
  - Embotics
  - Verizon

- Industry Platforms
  - "developer.<company>.com"

- App-Centric Platforms
  - Salesforce
  - SAP
  - Oracle
  - Adobe
  - Microsoft
  - Intuit
  - ADP

- Mega-Platforms
  - Amazon
  - Microsoft
  - Oracle
  - Google
  - IBM
  - Alibaba Group

- Infrastructure Providers
  - Network Service Providers
Chapters of the 3rd Platform

Chapter 1 | 2007+ EXPERIMENTATION

Chapter 2 | 2015+ MULTIPLIED INNOVATION

Chapter 3? | 2022+ AUTONOMY
Machines are training machines without close human oversight and are developing 10% of applications without in-depth involvement from developers by 2027.

Robotic augmentation industries launch the first commercial human-robot fusion applications by 2027.

By 2027, as many as 1/2 of today's job roles will be radically transformed - or made obsolete - through digital innovation and transformation.

By 2027, blockchain-enabled distributed service marketplaces will emerge that threaten to cannibalize 1/3 or more of the single-vendor controlled marketplaces.

A hybrid classical/quantum computing model takes a 25-30% share of the overall server market by 2022.
Chapters of the 3rd Platform

Chapter 1 | 2007+ EXPERIMENTATION

Chapter 2 | 2015+ MULTIPLIED INNOVATION

Chapter 3 | 2022+ AUTONOMY
Positioning for Leadership in Chapter 2

Master the **Key Enablers**

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- **over 15% specialized**
- **over 90% multicloud**

**Multiplied Insights**

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**Multiplied Development**

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**Multiplied Trust**

By 2020, 25% of top global banks, nearly 30% of manufacturers and retailers and 20% of healthcare organizations will use blockchain networks in production.
Positioning for Leadership in Chapter 2

Reorient Around the New Enterprise IT

Data-centric | Analytics/Al-intensive

Agile/DevOps Operation & Culture

80% Externally-sourced | API-enabled
Positioning for Leadership in Chapter 2

Redefine Your **Role** (& **Ecosystem**)

- **Multicloud Integration/Mgt Platforms**
- **Industry Platforms**
- **App-Centric Platforms**
- **Mega-Platforms**

*Infrastructure Providers*    *Network Service Providers*
“No matter who you are, most of the smartest people work for someone else.”

Bill Joy
Co-founder, Sun Microsystems
Thank you!