

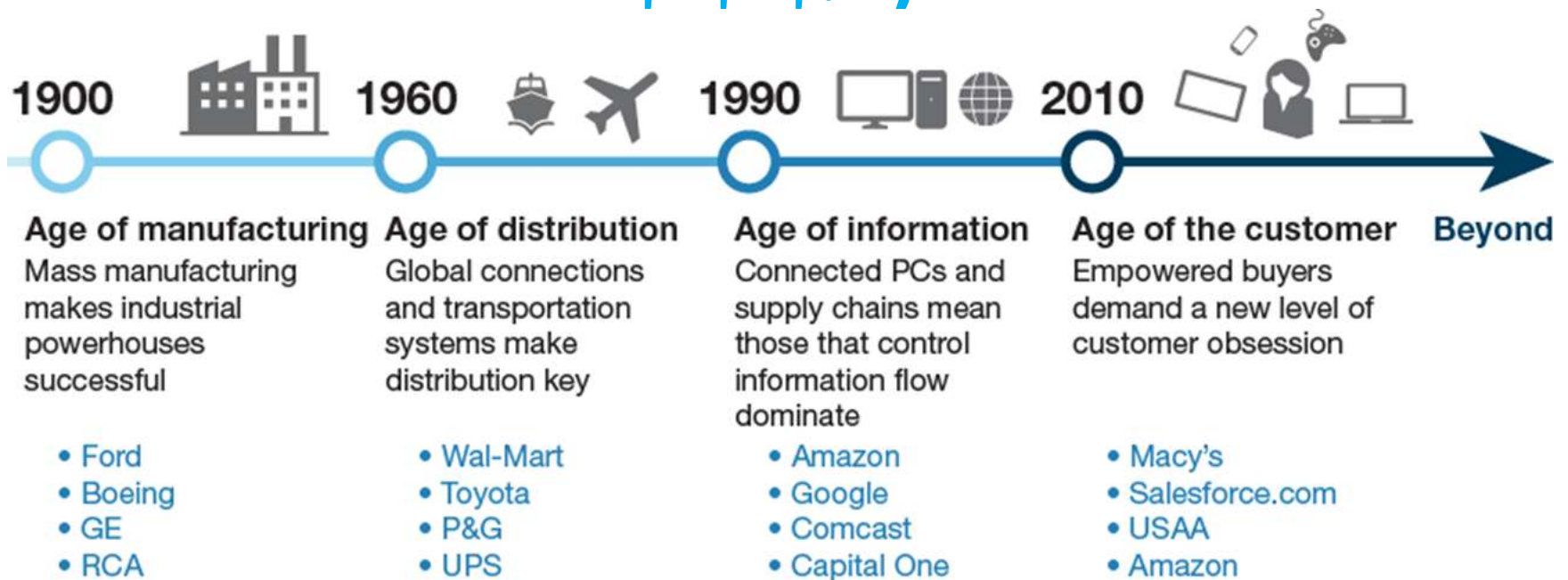
2015년 글로벌 IT 전망 및 비즈니스 인사이트

김 영진

포레스터 한국지사장

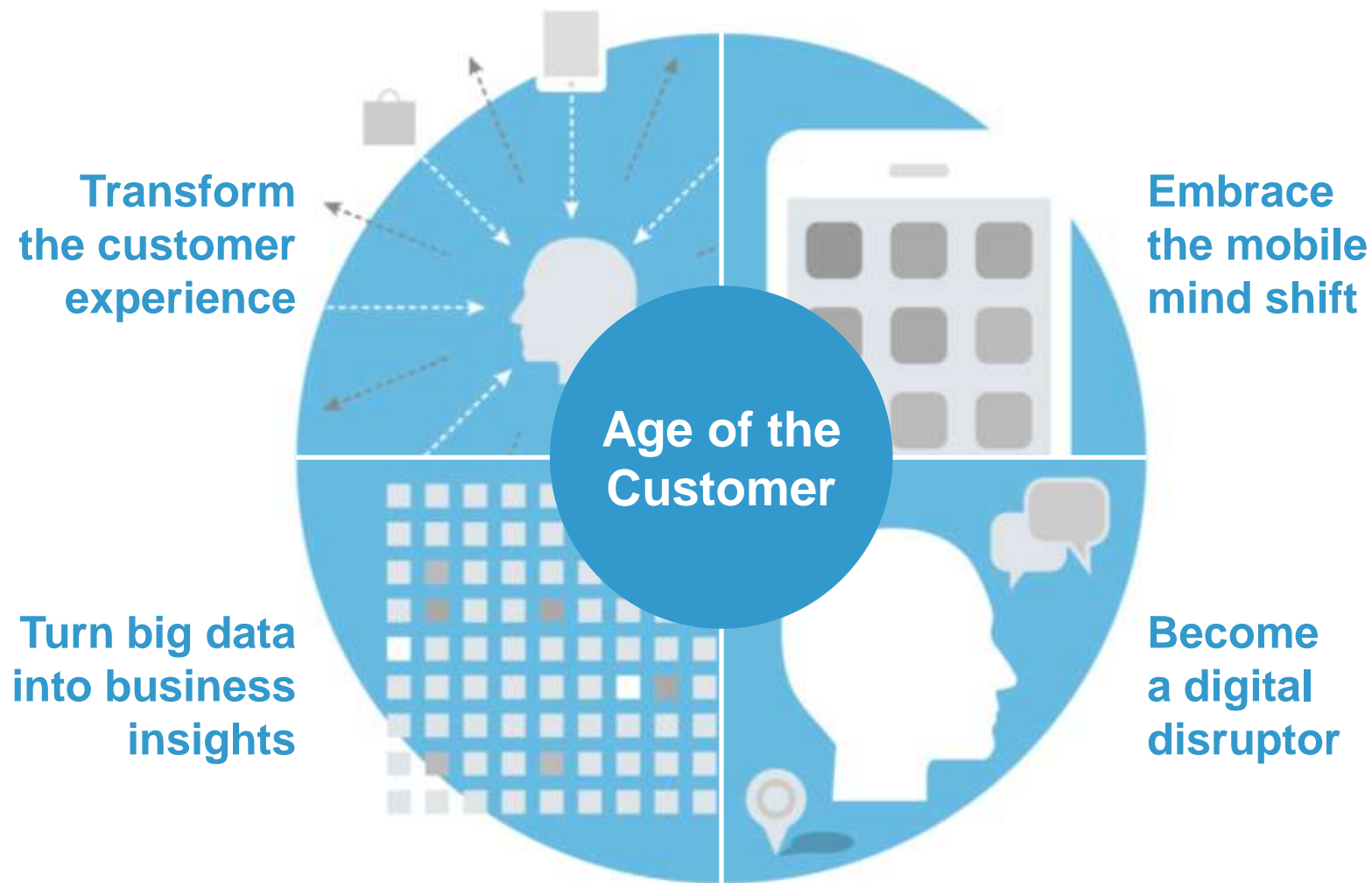
2015.1.29

The Age of the Customer(고객위주시대 비즈니스)

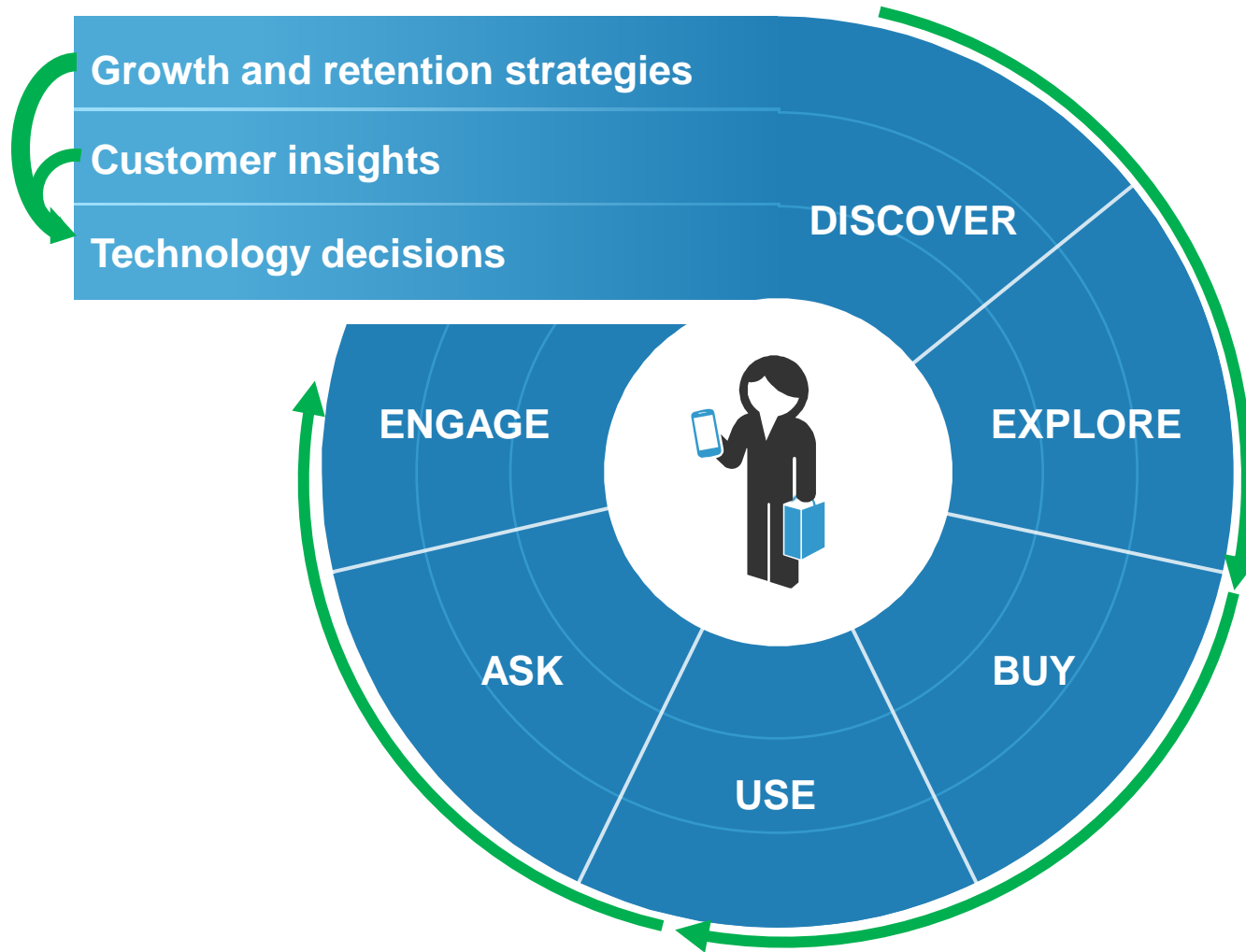


The Age of the Customer is a 20-year business cycle in which the most successful enterprises will reinvent themselves to systematically understand and serve increasingly powerful customers.

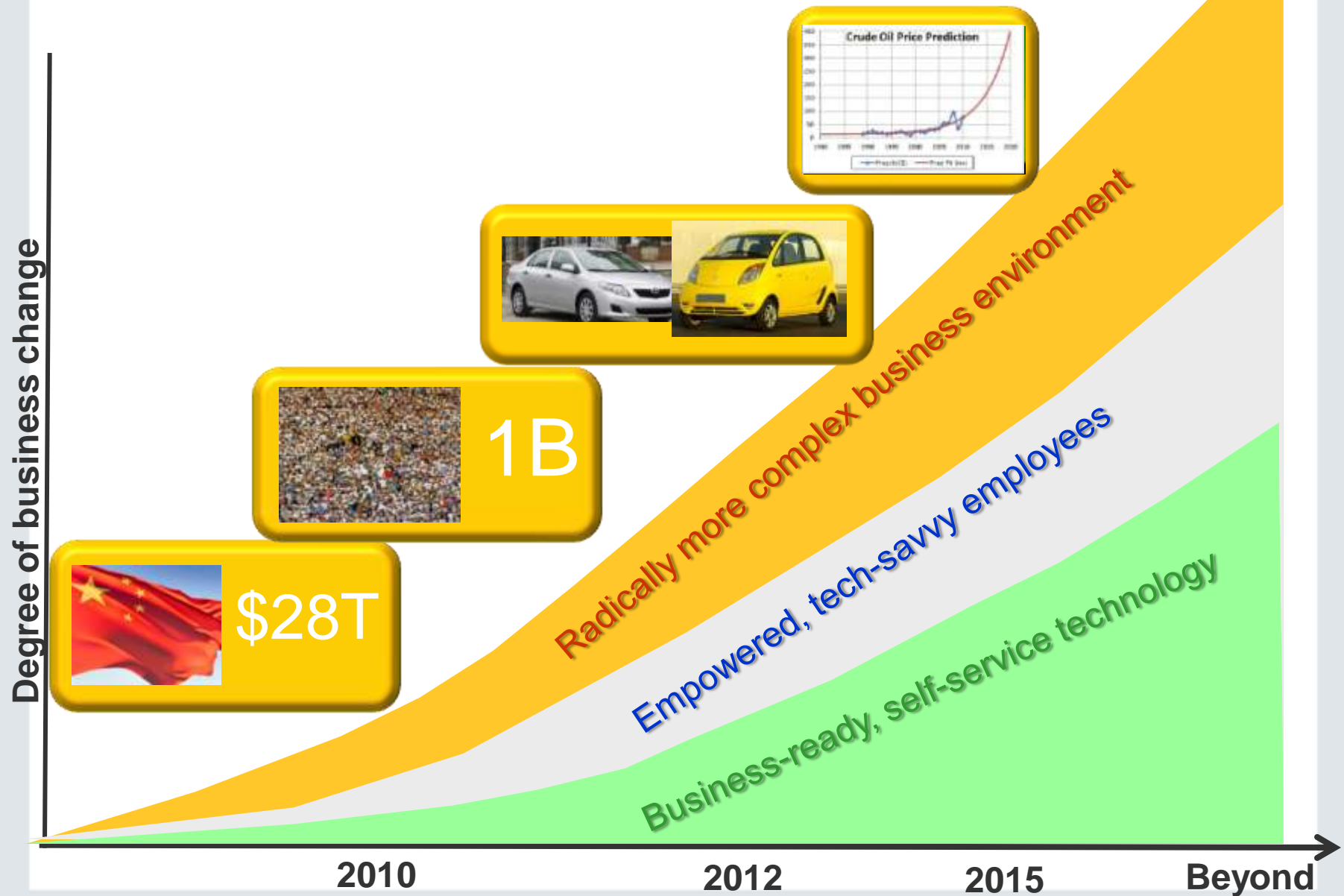
고객위주 시대의 4가지 중요 비즈니스분야



고객 라이프사이클 위주의 마켓전략수립



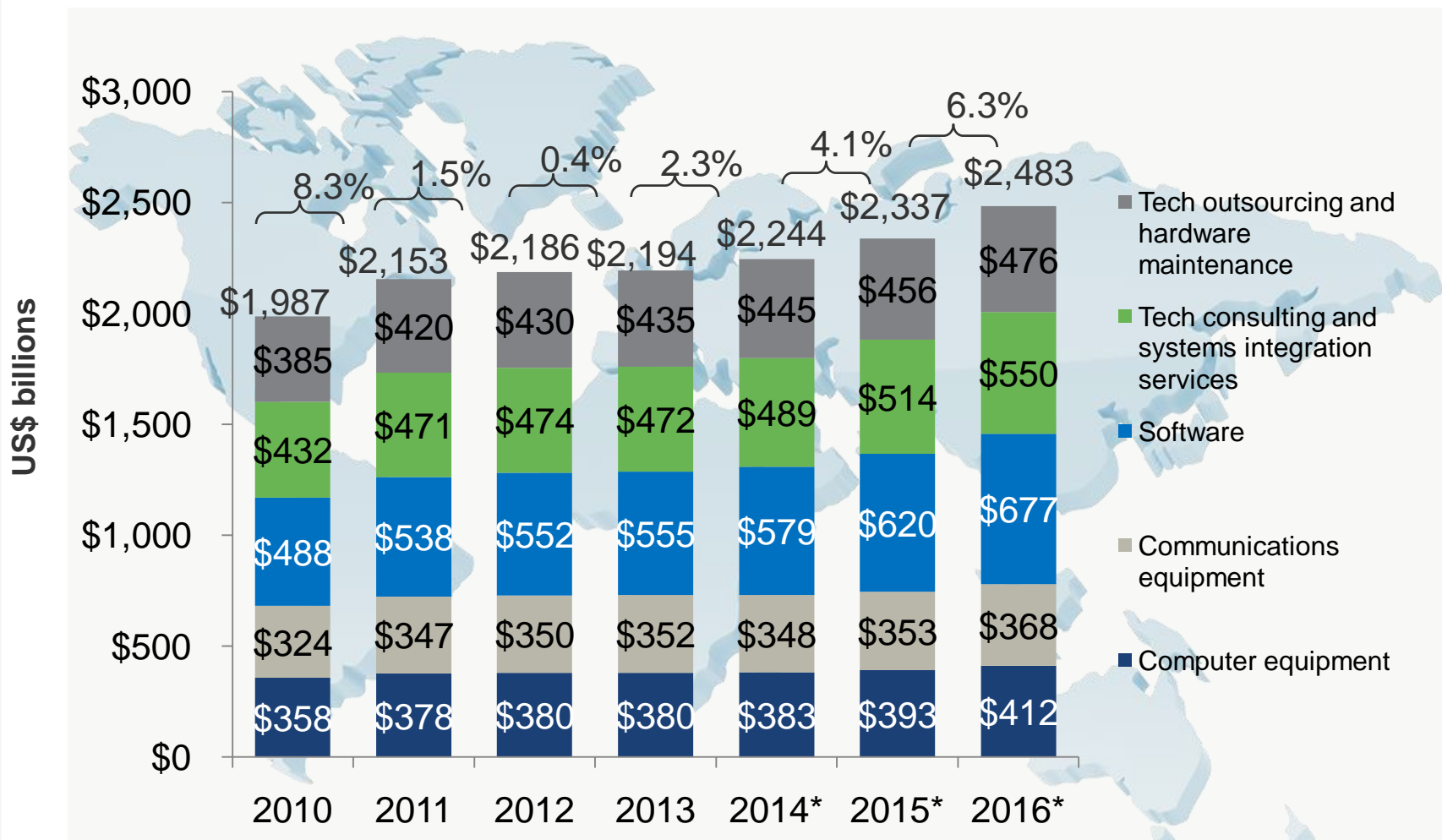
글로벌 경제주체 및 비즈니스의 변화



2015-2016년의 IT 투자의 4가지 현상

1. 글로벌 IT 시장의 지속적인 성장
2. 신규비즈니스를 위한 프로젝트 투자는 증가하지만 운영을 위한 투자는 정체
3. 수익창출을 위한 비즈니스 테크놀로지 분야(BT)에 투자활성화
4. 하드웨어와 아웃소싱 보다 소프트웨어와 서비스분야에 투자활성화

전세계 IT 분야별 시장 변화(2010 ~ 2016)



*Forrester forecast

글로벌 IT 시장 성장율(IT 제품군별)

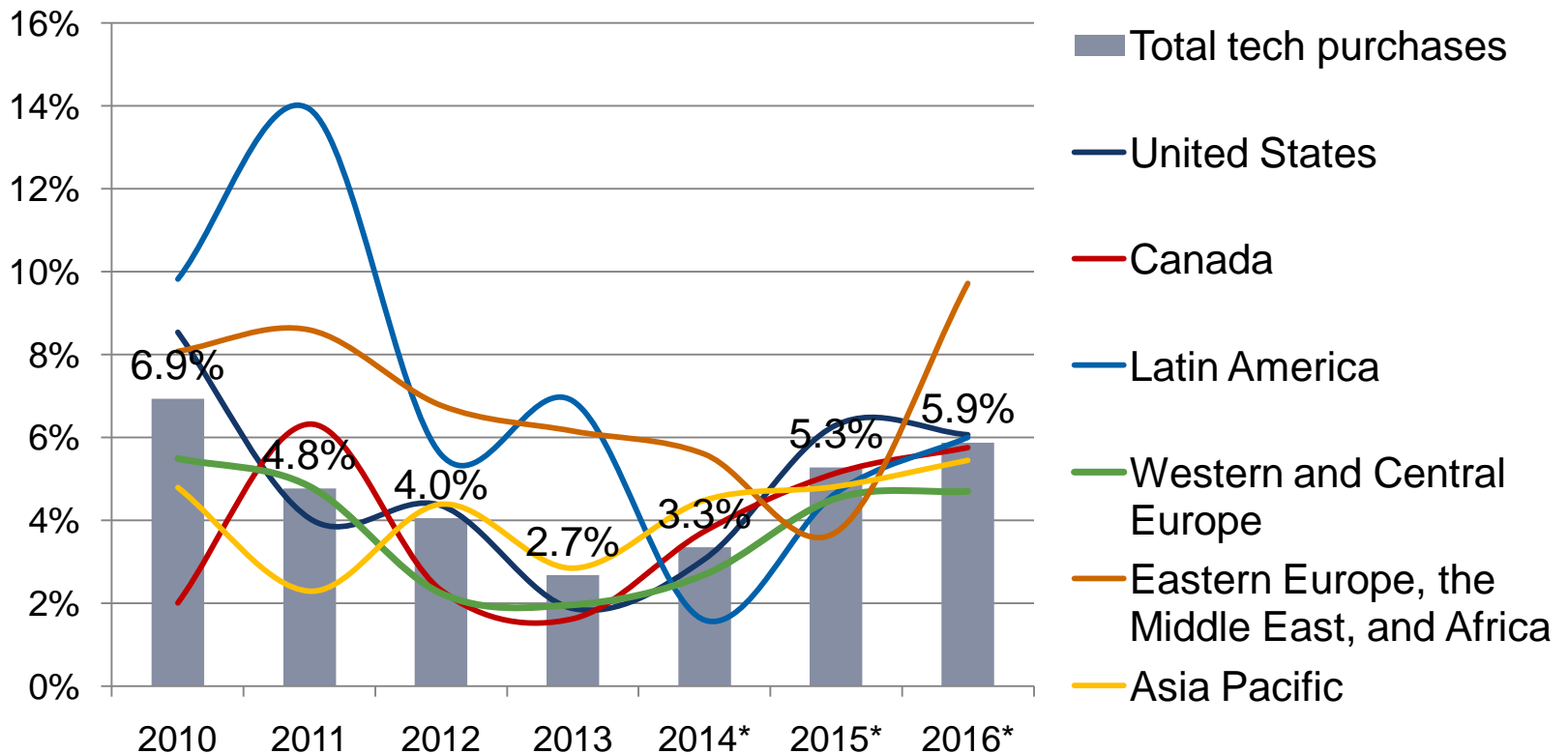
SOFTWARE AND CONSULTING SERVICES LEAD THE MARKET

Global in US\$ (% change)	2011	2012	2013	2014*	2015*	2016*
Computer equipment	11.0%	5.6%	0.7%	-0.1%	0.9%	2.5%
Communications equipment	9.1%	7.1%	0.7%	0.6%	-1.1%	1.5%
Software	3.9%	10.1%	2.7%	0.5%	4.3%	7.1%
Tech consulting and systems integration services	5.4%	9.0%	0.5%	-0.3%	3.6%	5.1%
Tech outsourcing and hardware maintenance	13.5%	8.9%	2.5%	1.2%	2.1%	2.6%
Total tech purchases	8.1%	8.3%	1.5%	0.4%	2.3%	4.1%

*Forrester forecast

지역별 IT 마켓성장율(유럽저성장)

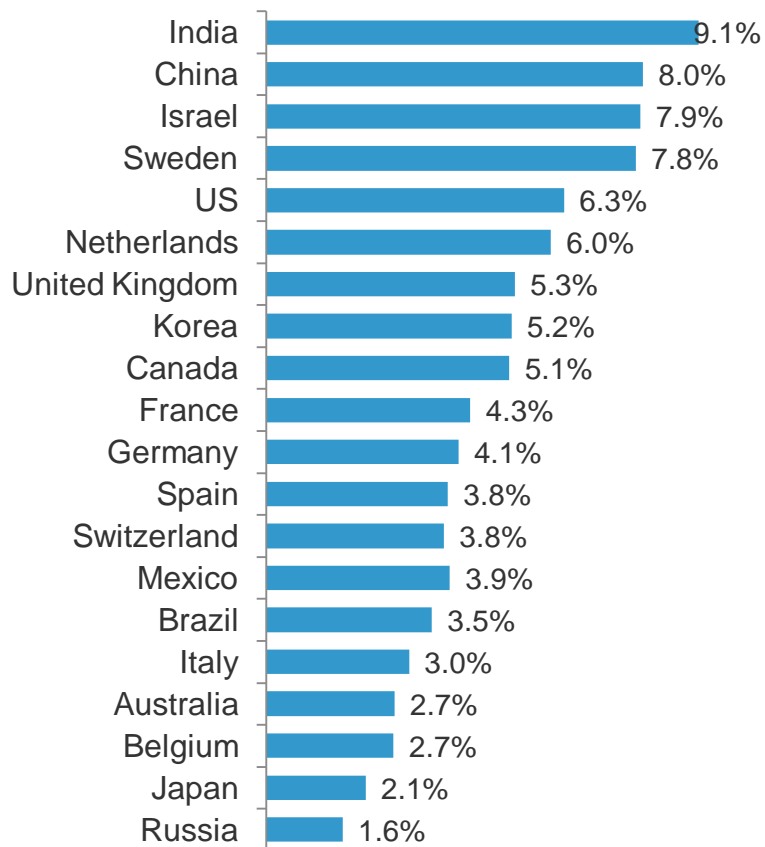
2010 to 2016 regional tech purchases forecast
(Percentage change in exchange-rate-adjusted US dollars)



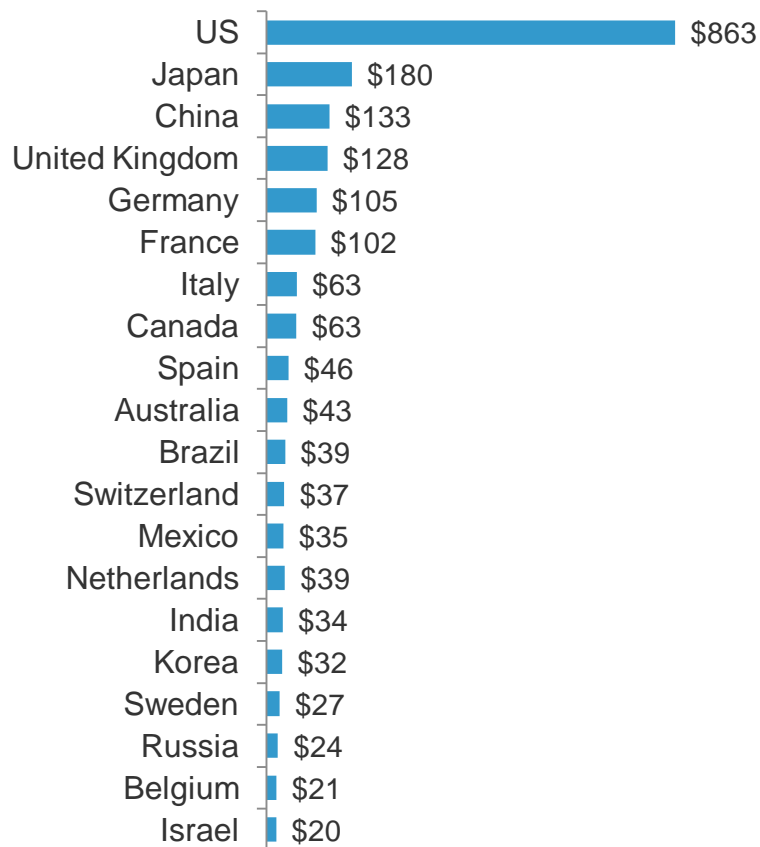
*Forrester forecast

2015년 글로벌 상위 20개국 IT 마켓현황

2015 percentage change in tech purchases in local currencies

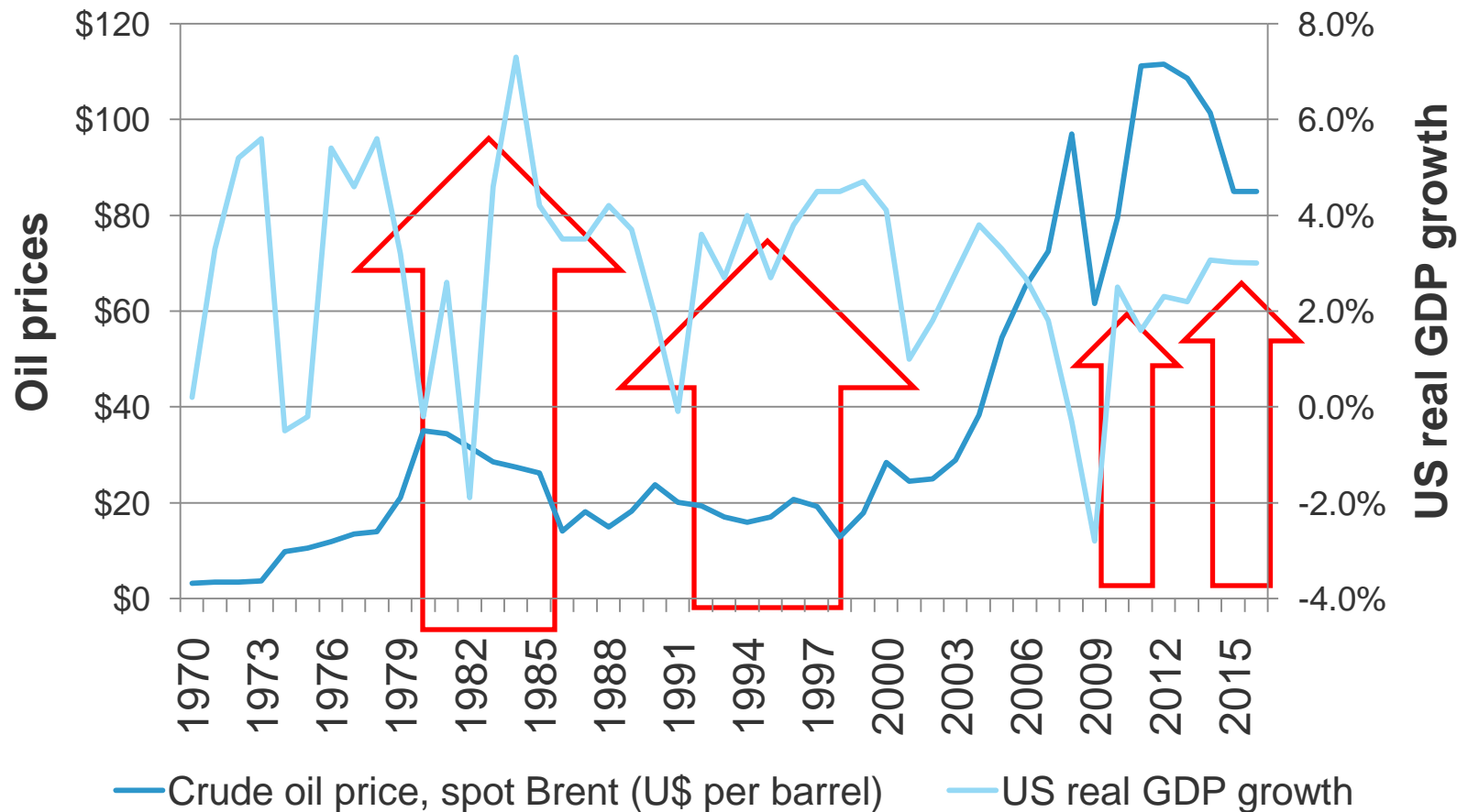


2015 tech purchases in US dollars



유가 인하에 의한 경제성장 (미국참조)

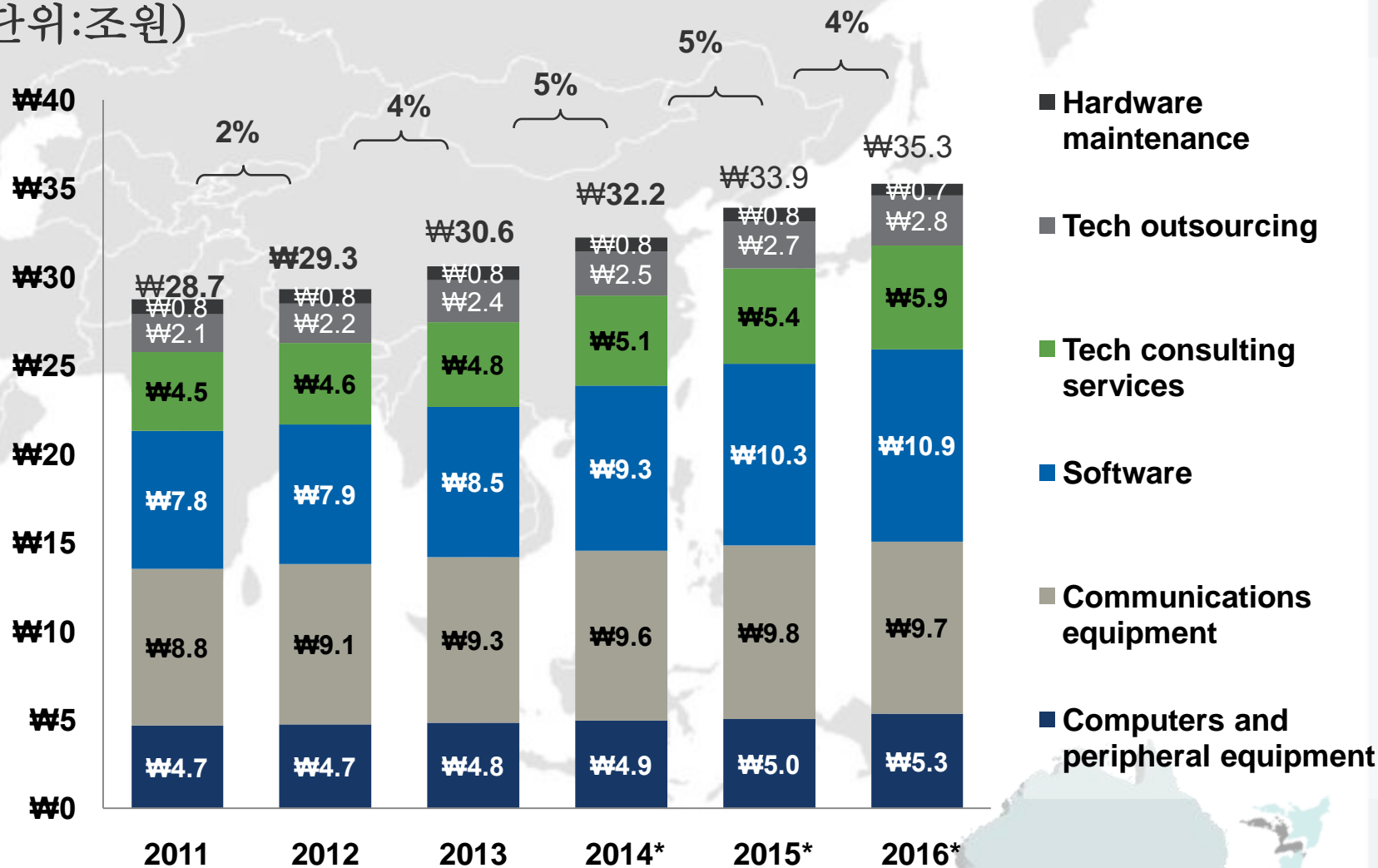
Drops in oil prices have tended to support stronger economic growth



한국의 IT 분야별 시장예측(2011 ~ 2016)

(단위:조원)

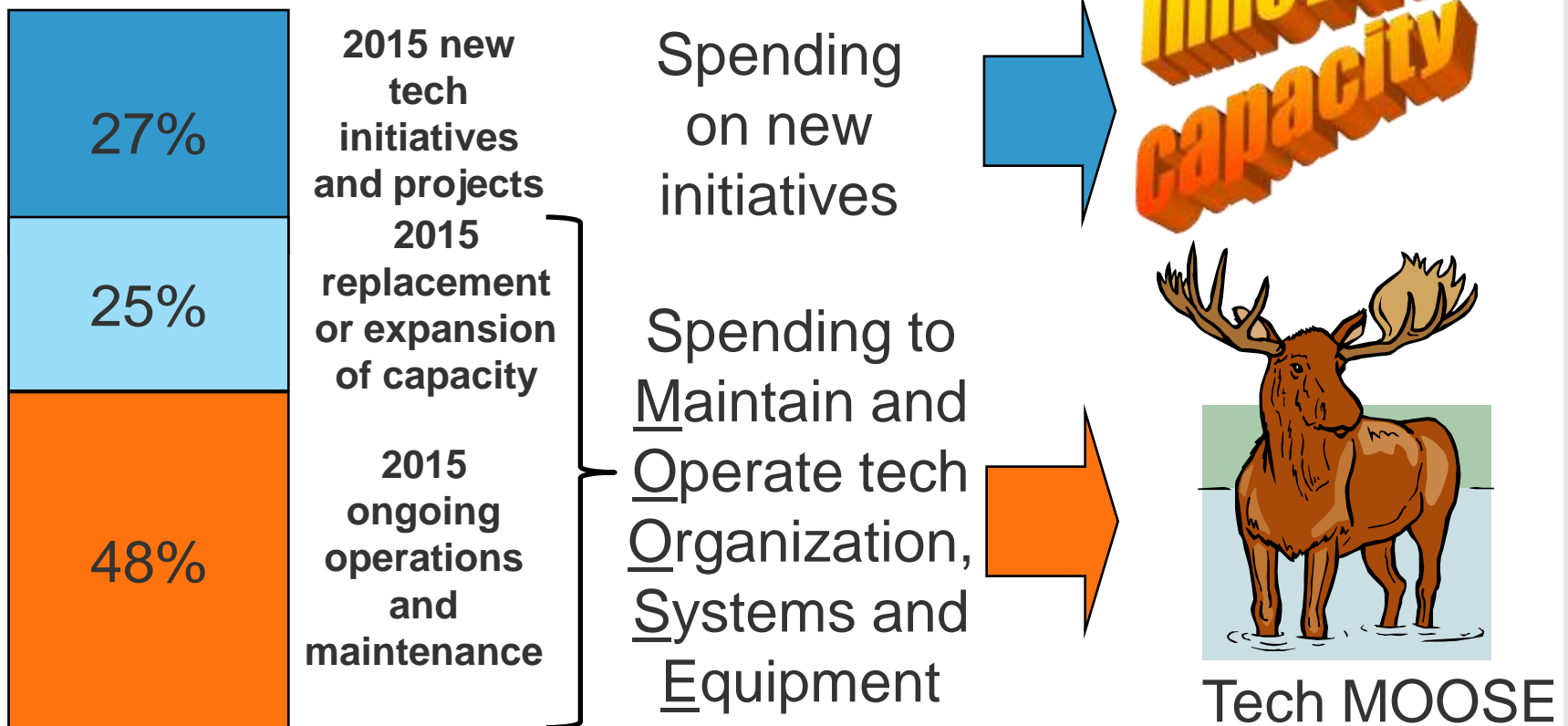
South Korean won trillions



*Forrester forecast

Source: Forrester Research, Inc.

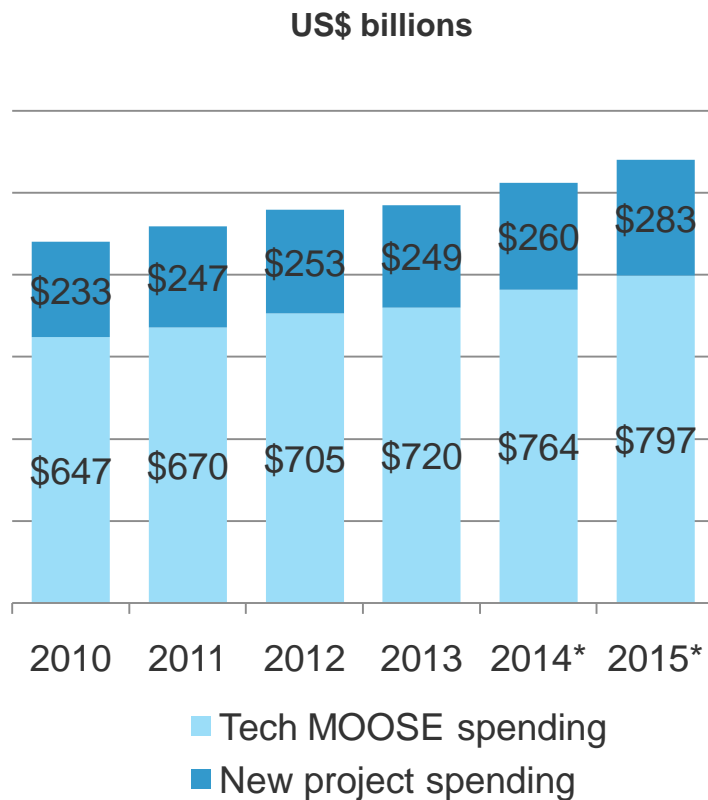
혁신을 위한 투자, 운영을 위한 “MOOSE”의 2가지 분야별 IT 투자 벤치마킹



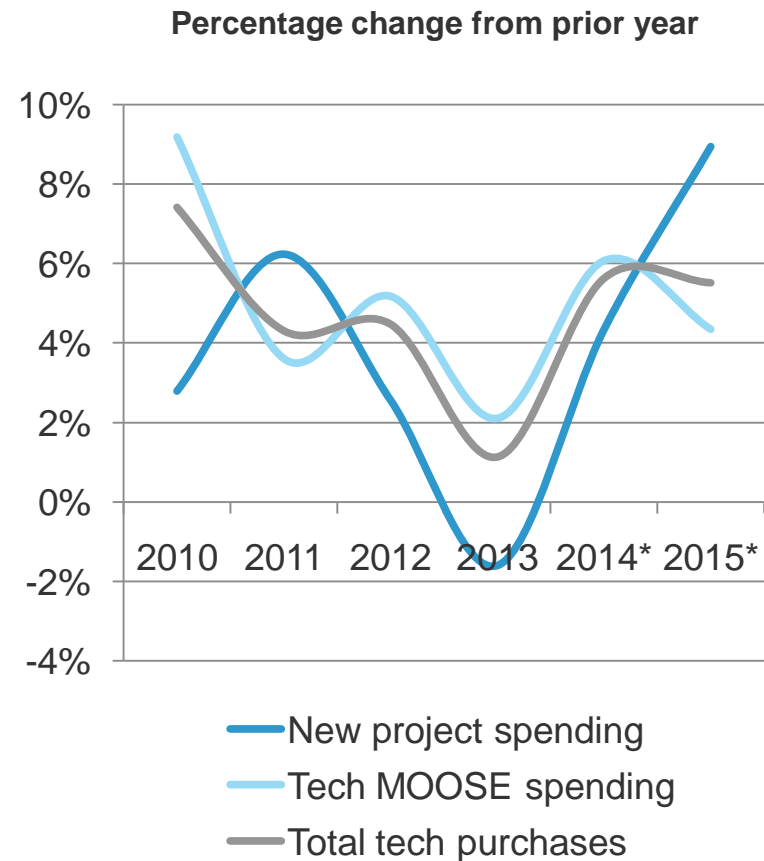
Base: 1,142 US firms; Source: Forrester's Business Technographics® Global Budgets Survey, 2014

MOOSE 대비 신규 프로젝트 투자비용의 상승 - 2015 /미국예

US tech spending by new project versus tech MOOSE



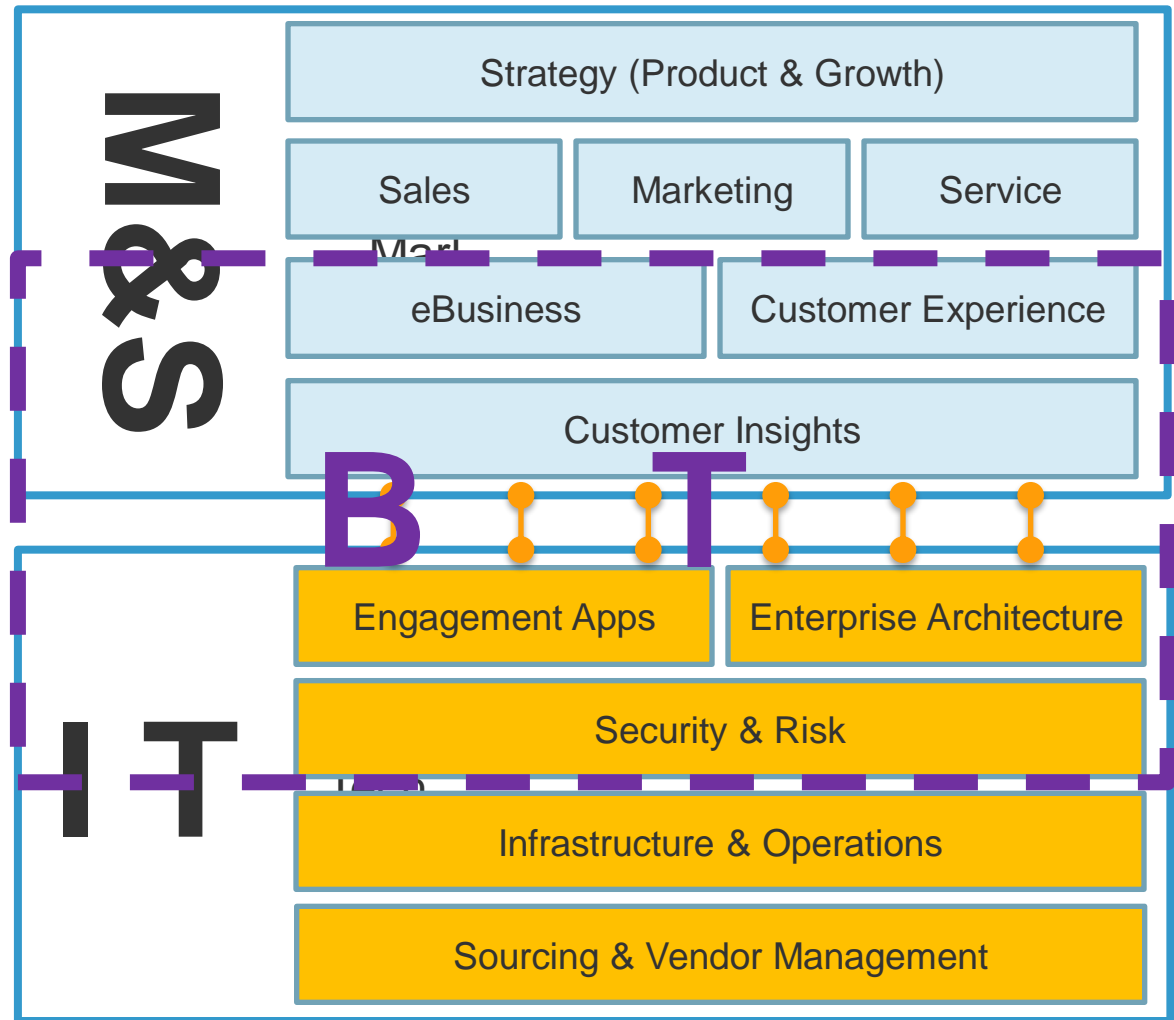
*Forrester forecast



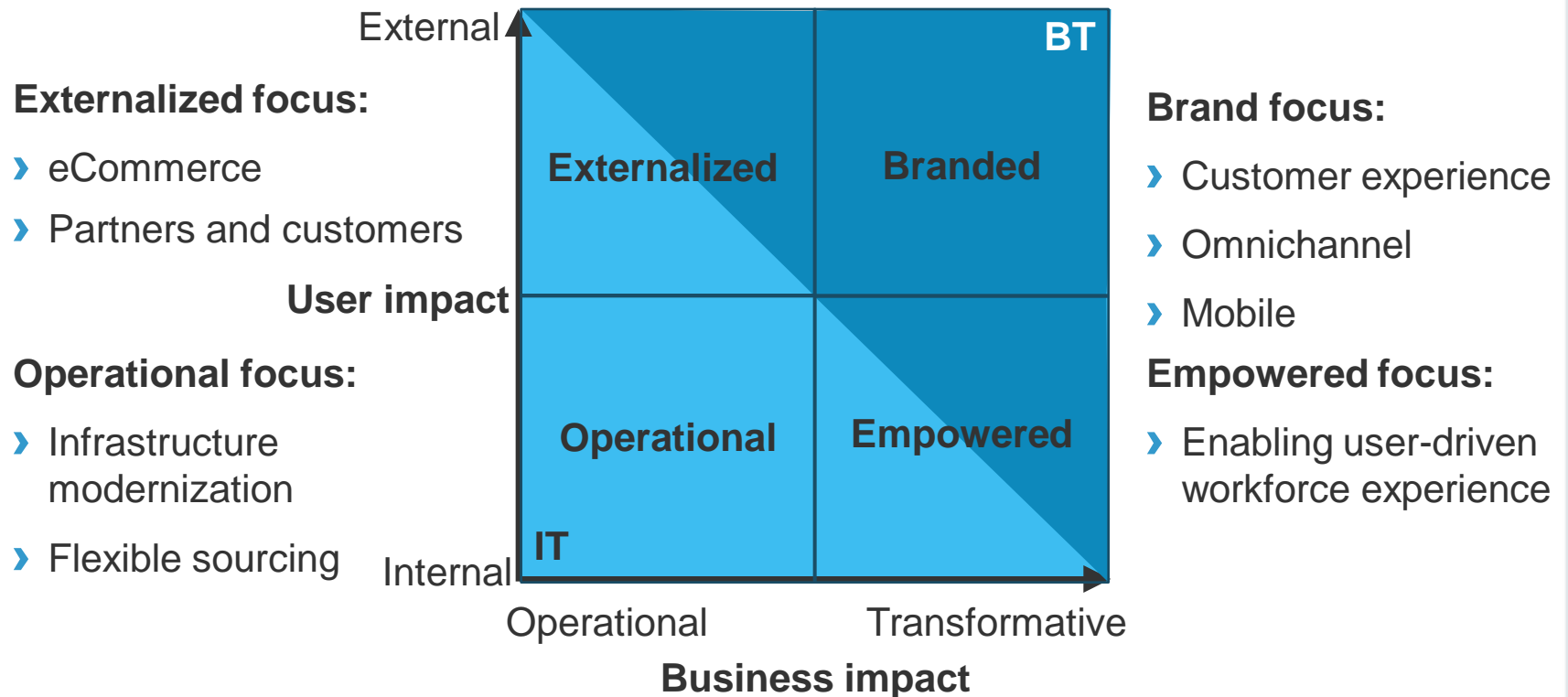
BT(Business technology)의 시대적 요구

➤ Information technology — the systems, technologies, and processes to support and automate **business operations**.

➤ Business technology — the systems, technologies, and processes to win, serve, and retain **customers**.

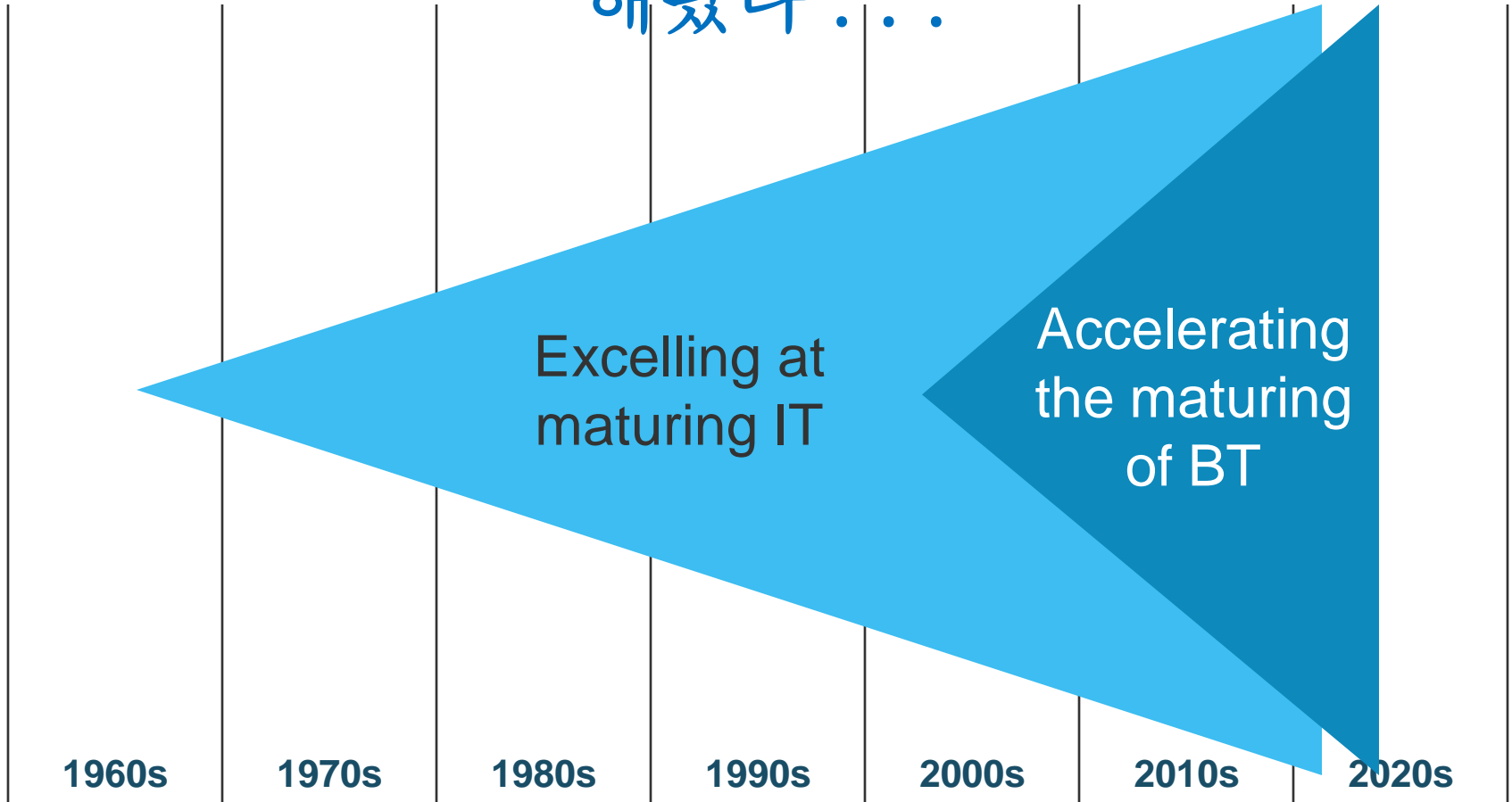


IT와 BT중 고객위주의 BT 서비스 가치 향상



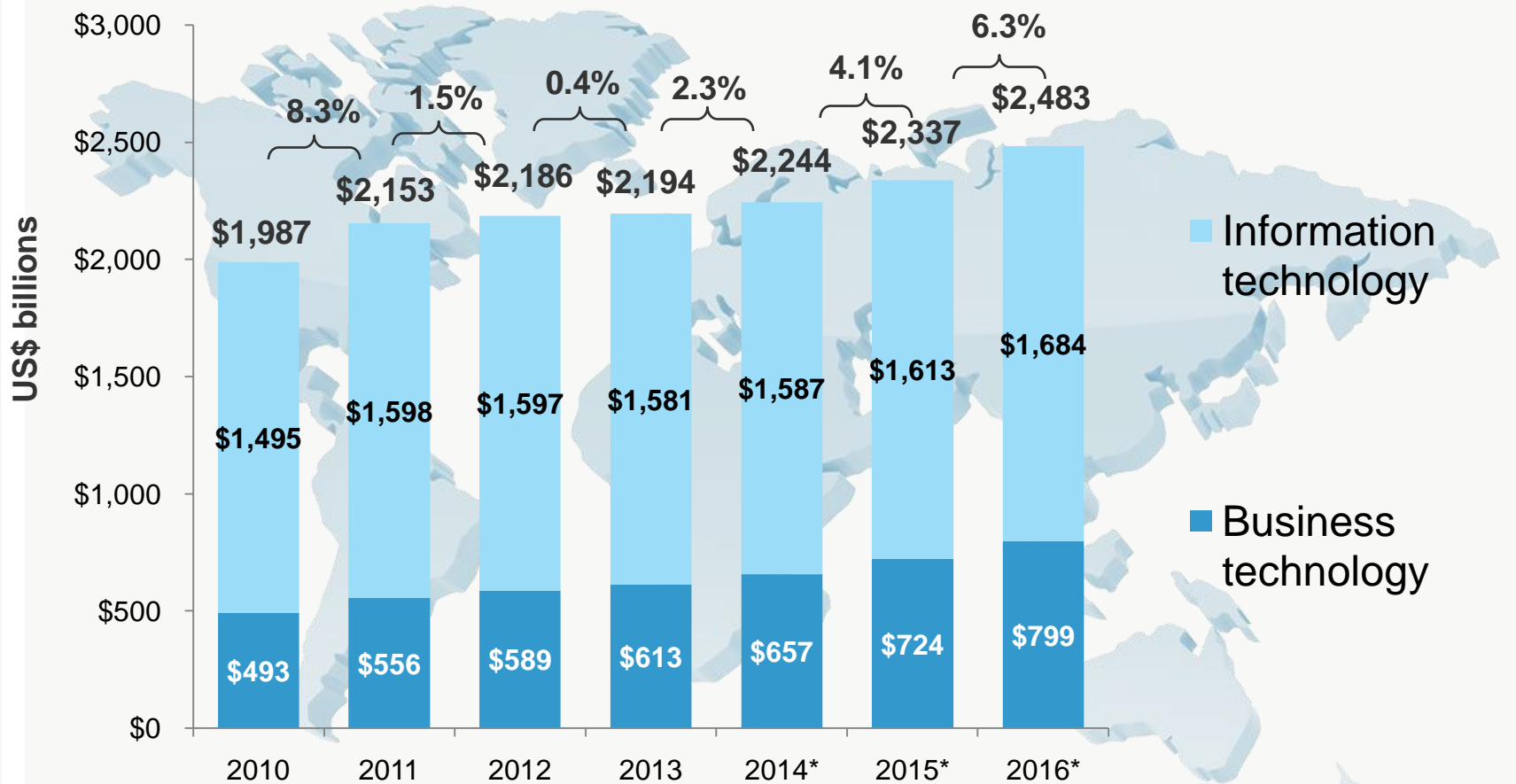
Source: April 1, 2014, "The Age Of The Customer Redefines Technology Management Archetypes" Forrester report

지난 50년동안 IT에 치중해서 서비스를 제공
해왔다...



We have to mature BT in a third of the time!

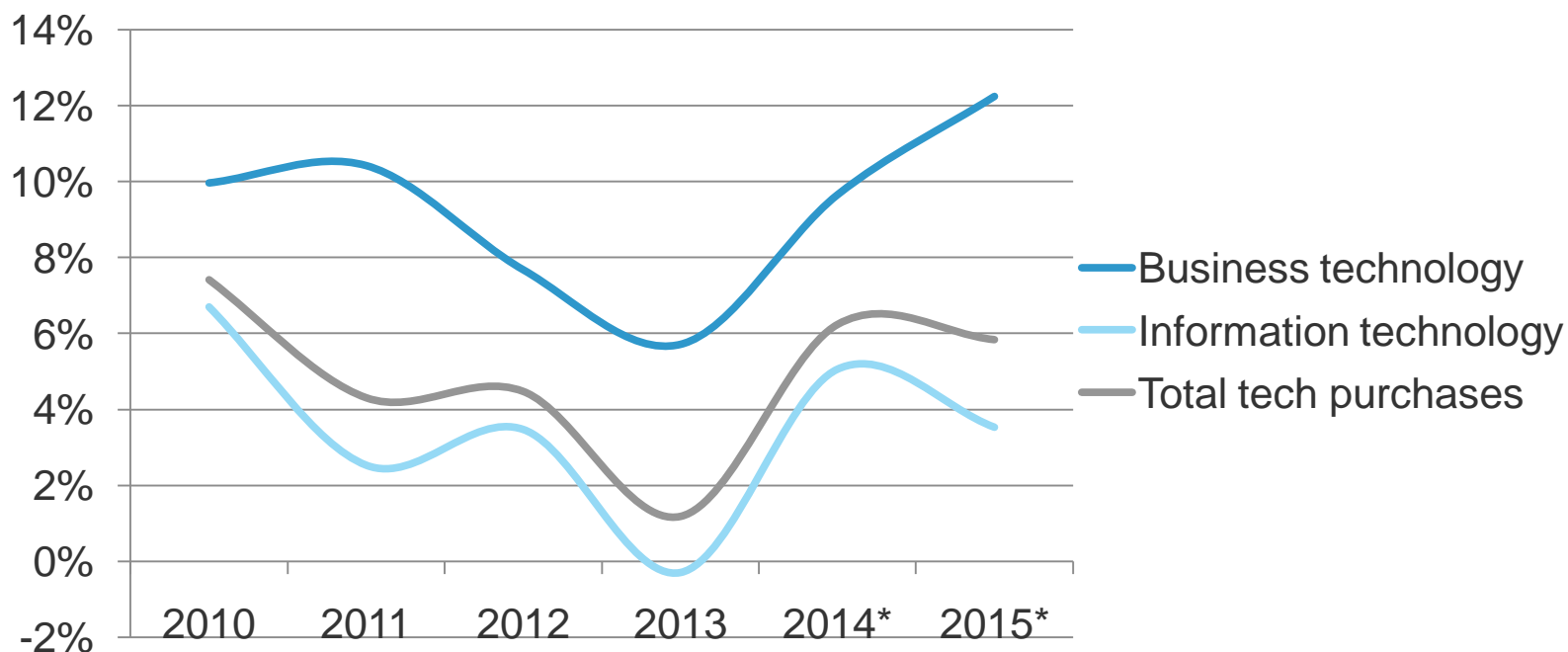
BT는 IT에 비하면 투자비용이 적지만 향후는 더많은 투자분야 이다



*Forrester forecast

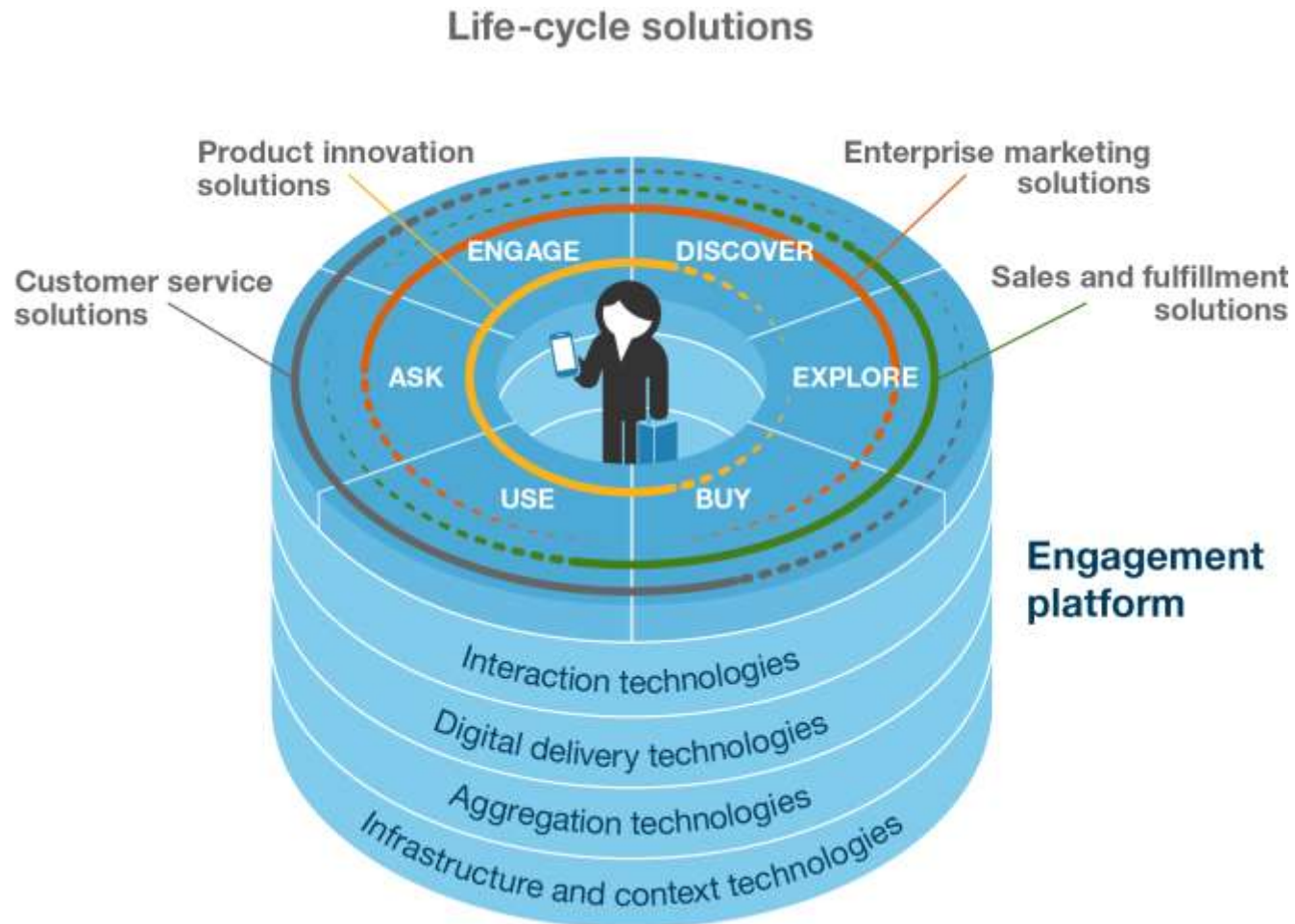
비즈니스 성장을 위한 BT 더 많은 투자

US tech spending by business focus
(Percentage change from prior year)



*Forrester forecast

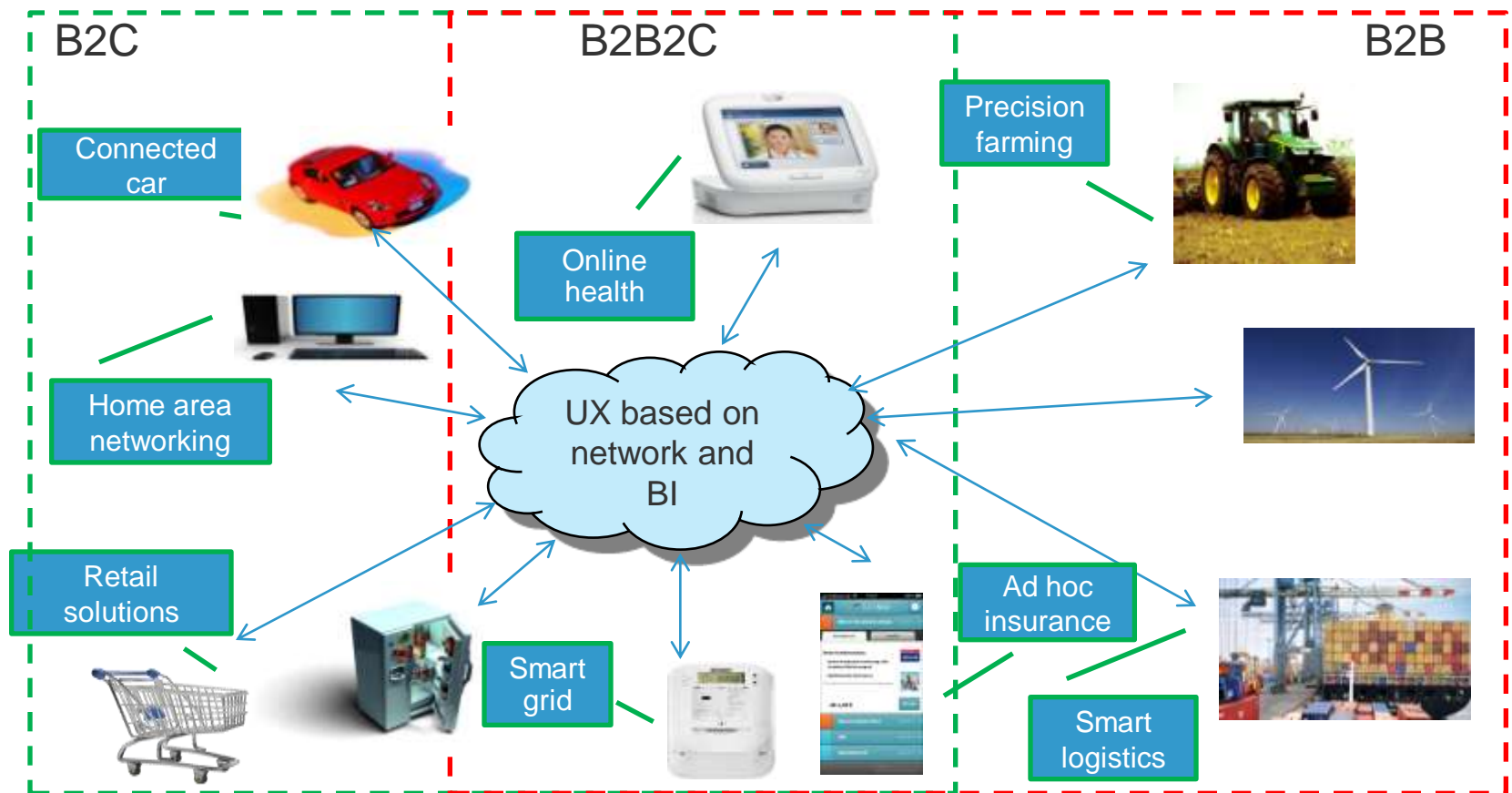
Business technology 는 고객 라이프 사이클 솔루션을 제공 해야한다.



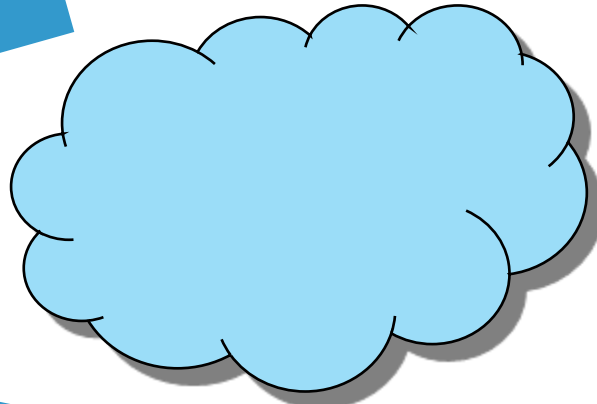
BT를 위한 주요 기술전망: 2015 ~ 2020

Innovation Group Type	Emerging technology innovation categories
Business solution innovations	<ul style="list-style-type: none">• Customer analytics• Digital experience solutions• Customer-driven design• Internet of Things
Interaction platform innovations	<ul style="list-style-type: none">• Next-generation connectivity• Wearable technology• Natural computer interfaces
Digital delivery and aggregation platform innovations	<ul style="list-style-type: none">• Real-time data sourcing and delivery• Advanced analytics• Digital identity management• Software acceleration platform and tools
Infrastructure and context platform innovations	<ul style="list-style-type: none">• Advanced silicon devices• Software-defined infrastructure• Cloud integration• Big data management

The Internet of Things (IoT) 의 서비스 구성분야



의료장비 생산업체는 병원과 환자들의
정보를 분석해서 서비스를 제공해야 한다



CES 2015 Health Care 기기들



Pen Blood sugar check



스타업기업들의 참신한 IoT 제품 및 서비스 제공-Home Connected

zonoffTM

Creators of the Intuitive Home



wigwag

Withings

nestTM

SONOS

Control **4**TM



PHILIPS

New entrants are popping up like mushrooms.

M2M - >사물인터넷(IoT) 비즈니스를 위한 고려사항

- *What kind of Materials in my location?*
- *What kind of digital data can be collected through any kind of network?*
- *The Collected data should be on Value stream for new business era.*
- *Target segment for new business development with customer life cycles.*
- *Estimated market size and future trends.*

Middleware 에서 고객서비스 SW로 투자 및 성장변화

Growth from prior year	2011	2012	2013	2014*	2015*
Operating systems	1.4%	2.9%	-7%	-4%	3%
Storage management	15%	5%	9%	-4%	6%
Database management systems	10%	9%	2%	1%	5%
IT management tools	6%	1%	3%	5%	5%
Security	7%	8%	5%	5%	7%
App servers and integration	16%	11%	9%	8%	7%
Application development tools	10%	4%	0%	4%	7%
Desktop applications	11%	9%	6%	4%	5%
Information management applications	10%	15%	8%	13%	11%
Enterprise process applications	10%	10%	7%	19%	10%
Enterprise vertical applications	11%	8%	7%	11%	9%
Mobile applications built by contractors and consultants	278%	135%	125%	56%	39%
Other custom applications built by contractors and consultants	5%	-11%	-20%	-4%	3%

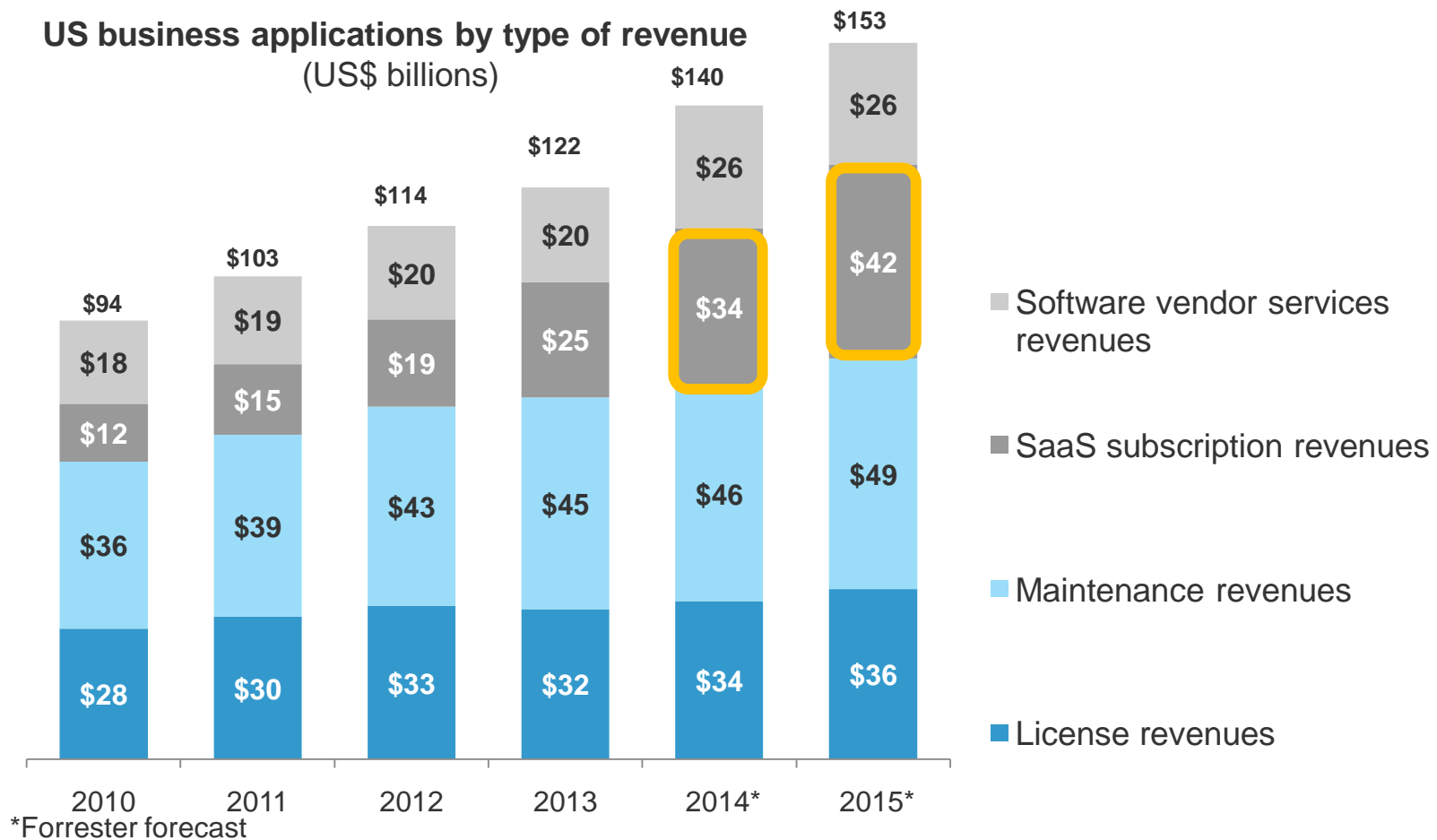
Middleware

Applications

Custom applications

*Forrester forecast

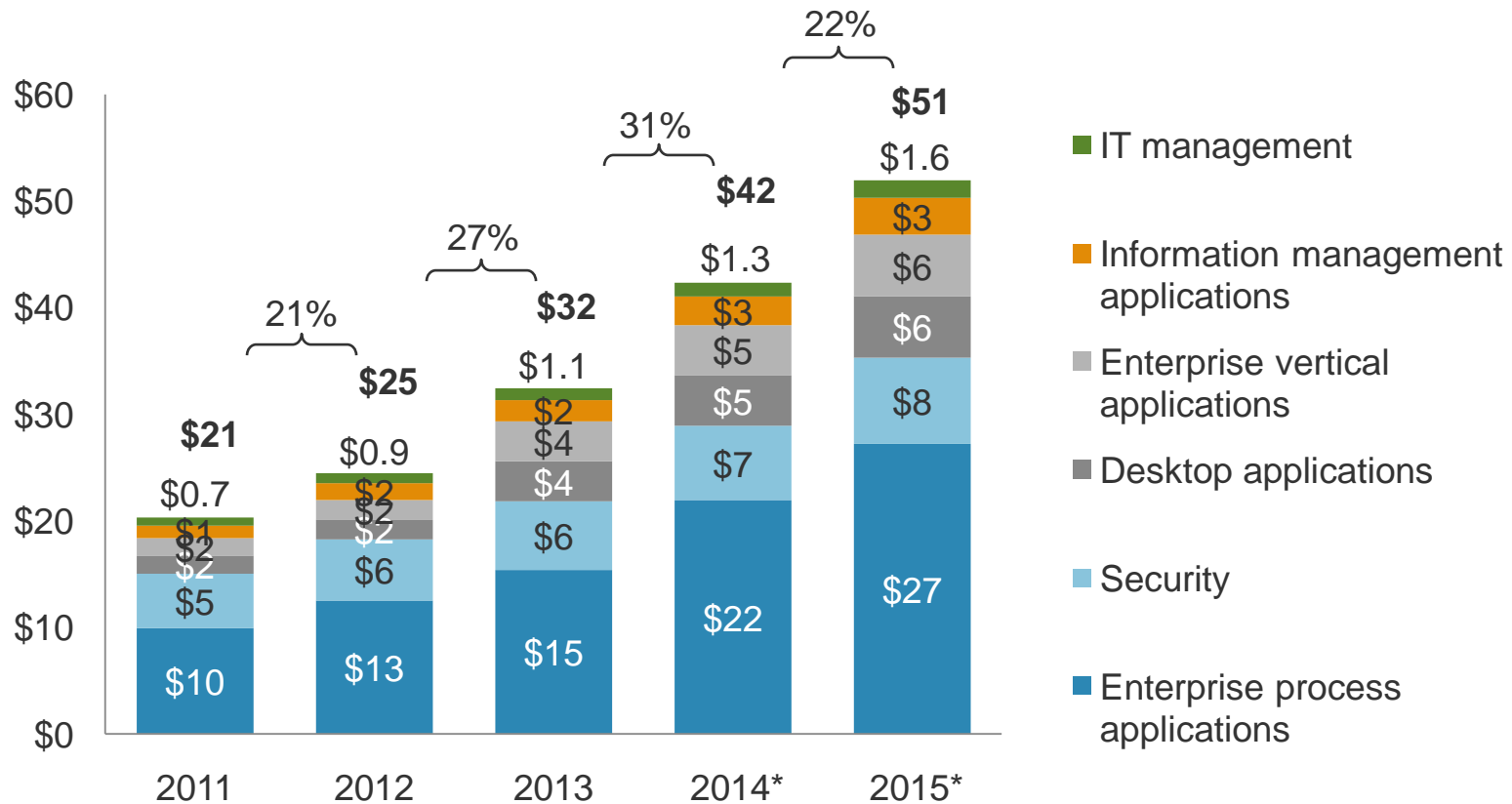
Business apps투자중 SaaS 사용 투자가 라이선스 사용 투자비를 초과 - 2014



Cloud 와 SaaS apps 은 Enterprise apps(CRM, HRMS, ePurchasing)과, desktop apps, Security에 통합되어 있다

US SaaS subscription revenues

(US\$ billions)



2015년 주요 BT/IT 예측

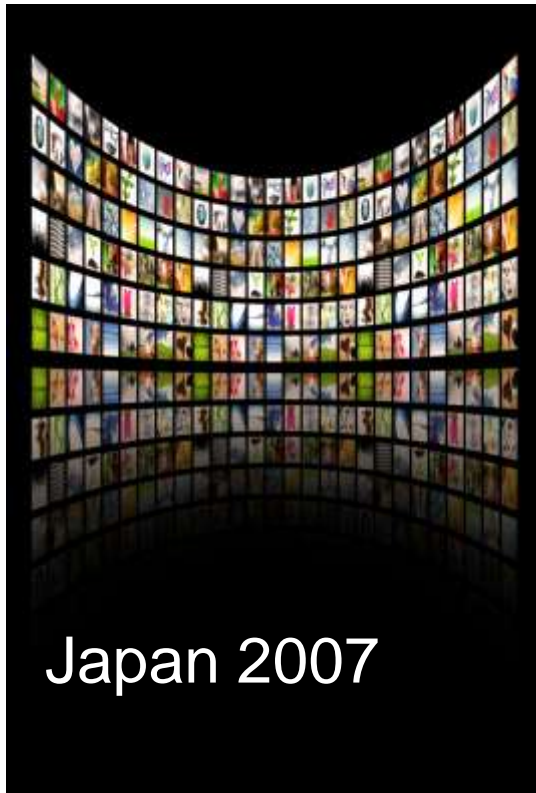
- *Gap between Digital leader and laggards*
- *Mobile Mind Shift*
- *New business portfolio Apple*
- *Privacy is competitive differentiator*
- *Data is the new business product*
- *Innovation by acquiring start-up or small company*
- *Not all see the Fruits from digitization*
- *Cloud is the new normal*
- *CIO's role as digital daddy*

위기의 한국은 어디로 가야 하는가?

*엔화 약세의 일본 과 저인건비 생산국 사이의 한국
경쟁력 강화방안?*

일본(엔하락) vs 한국(?) vs 중국(제조강국)

R&D should be competitive edge and then Services, do not compete manufacturing against



BT 에 의한 경제주체의 이동

Tencent 腾讯

Haier

Alibaba.com

HUAWEI

WeChat

Baidu

SAMSUNG

coupang
Cuts Your Days

TMON

TALK

LG

WE make PRICE

LINE

PANTECH

Canon

SONY

HITACHI
Inspire the Next

Panasonic

SHARP

CASIO

SANYO

YAMAHA

amazon.com

Sun

ORACLE

PayPal



Google

hp HEWLETT®
PACKARD

IBM

2015년 ICT의 중점 수행과제

- Prospects for steady, moderate growth in 2015 will allow IT to increase their tech spending.
 - CIOs should prioritize investments that support the BT agenda.
 - Cloud computing and mobility create opportunities to change the economics and agility of tech management.
 - Technologies of analytics, big data, and smart process apps create opportunities for CIOs' organizations to help transform the business.
 - CIO and CMO should have to work together for BT agenda.
 - Firms should develop strategy with outside –in methodology in age of customer.
 - Because of a weak demand for PCs, servers, network gear, middleware software, mature apps, and outsourcing, now will be a good time to negotiate big savings in new or existing systems.
 - Focus on driving down tech MOOSE costs to create room for new BT MOOSE.
 - Use tech budget benchmarks for guidance on where to look for cost savings (or perhaps increases in spending).

감사합니다. 문의 사항 연락 주십시오

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