

# Capital Markets Day 2021

23 February 2021



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CAPITAL MARKETS DAY 2021

# Technology Vision

Bernd Gross  
Chief Technology Officer

# Our Moonshot

\$10  
Trillion

Digital Dividend,  
World Economic  
Forum

\$100B  
2030

Truly Connected Enterprise

\$26B

Adjacent

IoT & Analytics Tech

\$10B

Adjacent

Integration  
& API Tech

\$28B

TAM 2024



Ecosystem  
Driven Economy



Digital  
Business Excellence



Connected  
Customer Experience

# Connected Customer Experience



## The best CX has no UX!

Execute tasks behind the scenes, be proactive and anticipate individual needs

64%

consumers expect real-time interactions with businesses

Only 6%

CMOs align experiences across physical and digital touchpoints

\$ 9.8bn

IoT & analytics spend (2024) growing at 26% CAGR



Business Process



IT Portfolio Management



Hybrid Integration



Internet of Things



Industrial Analytics



API Management



Mainframe Evolution

# Digital Business Excellence



## Hyperautomation is essential

Data as a Service across enterprises and ecosystems drives innovation, automation and monetization

60%

high value projects require data collaboration across digital and IT teams

Over 3x

growth rate of IoT DaaS (Data-as-a-Service) compared to non-IoT DaaS

\$ 4.9bn

Business Transformation spend (2024) growing at 10% CAGR



Business Process



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API Management



Mainframe Evolution

# Ecosystem Driven Economy



## From product to platform

Modern enterprises are turning into platforms firms. Platforms are API First. The nature of enterprise software is changing with them to fit the model.

13x

more frequent use of ecosystem in annual reports than a decade ago

\$60bn

VC funding in digital platforms and ecosystems (2019)

\$13.5bn

Integration & API spend (2024) growing at 10% CAGR



Business Process



IT Portfolio Management



Hybrid Integration



Internet of Things



Industrial Analytics



API Management



Mainframe Evolution

The background features a series of teal-colored lines that are straight at the top and curve downwards and to the right, creating a sense of motion and depth. The lines are closely spaced and create a tunnel-like effect as they converge towards the right side of the frame.

# Harvest the wind of change

The next big wave of disruption is going to happen in the enterprise space with the potential to reshape the entire backbone of our economy.



 **software** <sup>AG</sup>