



**Service Industry Association  
Executive Roundtable**  
sponsored by Field Nation

**Roundtable Discussion  
September 8, 2016**





## Roundtable Discussion:

### John Kamen Delta Computer

- Opportunities and growth in
- the independent services Industry
- Gartner discussed an 8% growth in the market, where are the opportunities?
- Data exploding
- Hybrid Cloud
- Data Centers
- Traditional services growth
- New services as result of Data Revolution

# 1 THE RAPID GROWTH OF GLOBAL DATA

The production of data is expanding at an astonishing pace. Experts now point to a 4300% increase in annual data generation by 2020. Drivers include the switch from analog to digital technologies and the rapid increase in data generation by individuals and corporations alike.

■ Size of Total Data
 ■ Enterprise Created Data
 ■ Enterprise Managed Data

**2020: MORE THAN 1/3 OF THE DATA PRODUCED WILL LIVE IN OR PASS THROUGH THE CLOUD.**

**2012: CUSTOMERS WILL START STORING 1 EB OF INFORMATION.**



## WHAT IS A ZETTABYTE?

- 1,000,000,000,000 gigabytes
- 1,000,000,000,000 terabytes
- 1,000,000,000,000 petabytes
- 1,000,000,000,000 exabytes
- 1,000,000,000,000 zettabyte



1 terabyte holds the equivalent of roughly 210 single-sided DVDs.

It took roughly 1 petabyte of local storage to render the 3D CGI effects in Avatar.



In 2007, the estimated information content of all human knowledge was 295 exabytes.

## DATA PRODUCTION WILL BE 44 TIMES GREATER IN 2020 THAN IT WAS IN 2009

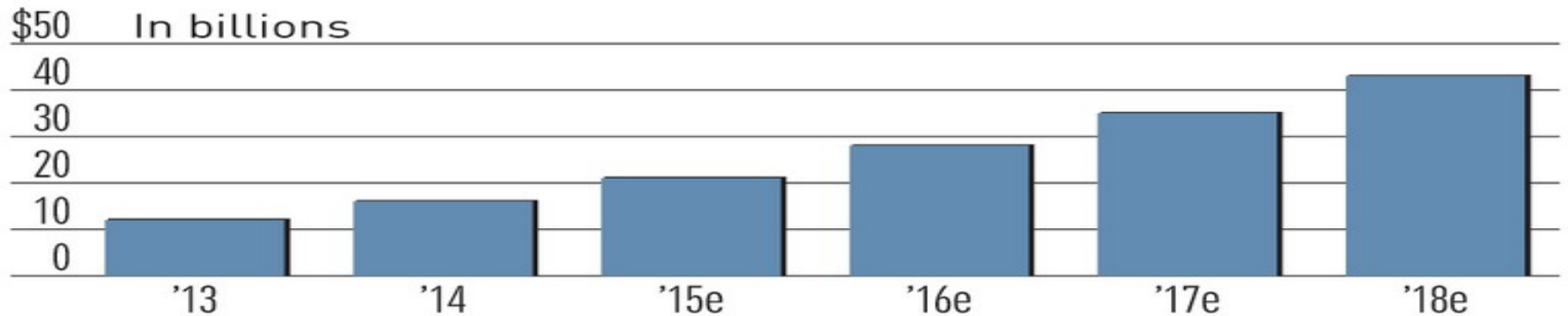
More than 70% of the digital universe is generated by individuals. But enterprises have responsibility for the storage, protection and management of 80% of it.\*



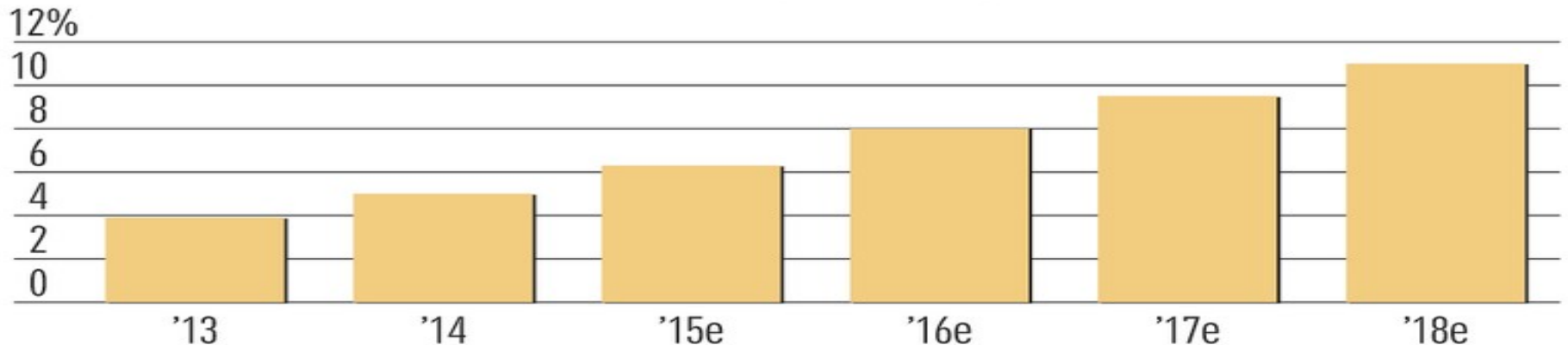
Is Cloud disrupting your services business or are you taking advantage of it?

## Cloud Disrupting Traditional IT

### Cloud computing infrastructure and platform market



### As a % of total enterprise IT spending



Source: Goldman Sachs (goldmansachs.com)



# IT Spending growth has slowed. Where are you seeing opportunities?

Table 1. IT Spending by Sector, Worldwide, 2014-2020 (Current U.S. Dollars)

	2014	2015	2016	2017	2018	2019	2020	CAGR 2015-2020
<b>Spending (Billions of Dollars)</b>								
Data Center Systems	166	171	175	179	180	183	185	1.6%
Enterprise Software	314	308	321	341	361	384	409	5.8%
Devices	694	650	626	632	634	636	637	-0.4%
IT Services	955	910	929	966	1,006	1,052	1,103	3.9%
Communications Services	1,604	1,470	1,441	1,470	1,494	1,514	1,541	0.9%
<b>Overall IT</b>	<b>3,734</b>	<b>3,509</b>	<b>3,492</b>	<b>3,586</b>	<b>3,676</b>	<b>3,769</b>	<b>3,875</b>	<b>2.0%</b>
<b>Growth (%)</b>								
Data Center Systems		2.9%	2.1%	2.2%	0.7%	1.7%	1.0%	
Enterprise Software		-1.9%	4.2%	6.0%	6.1%	6.3%	6.5%	
Devices		-6.4%	-3.7%	0.9%	0.4%	0.3%	0.0%	
IT Services		-4.7%	2.1%	4.0%	4.2%	4.5%	4.8%	
Communications Services		-8.4%	-2.0%	2.0%	1.6%	1.4%	1.8%	
<b>Overall IT Growth</b>		<b>-6.0%</b>	<b>-0.5%</b>	<b>2.7%</b>	<b>2.5%</b>	<b>2.5%</b>	<b>2.8%</b>	

Note: Numbers may not add up to totals shown because of rounding.