

A map of Europe with country names labeled in red text. The map is centered on the continent and shows the outlines of all European countries. The text is overlaid on the map, with some names appearing in a larger font size than others. The background of the map is a light blue color.

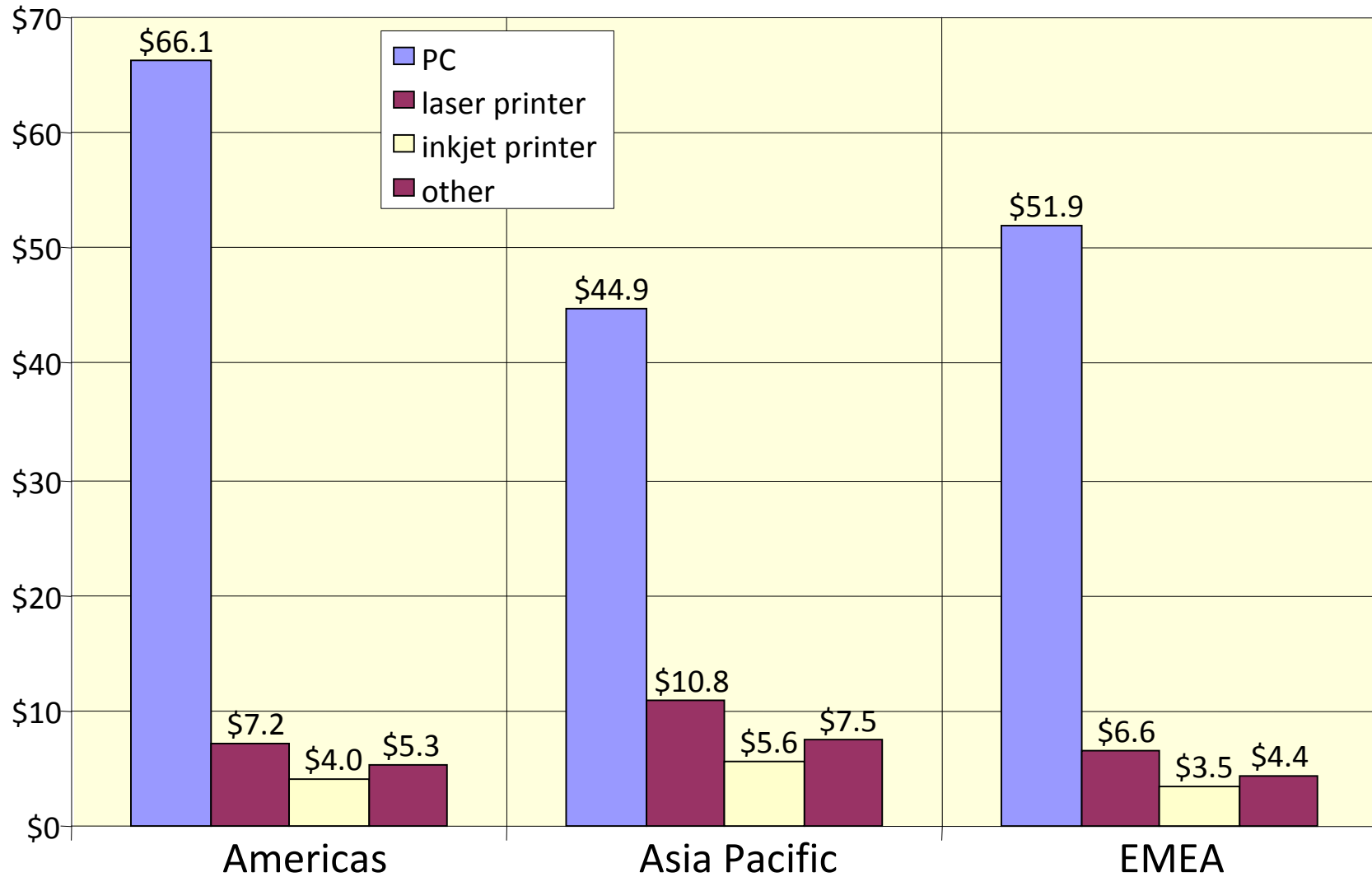
Global Service Delivery – OEMs in EMEA

Martin Hingley, ITCandor

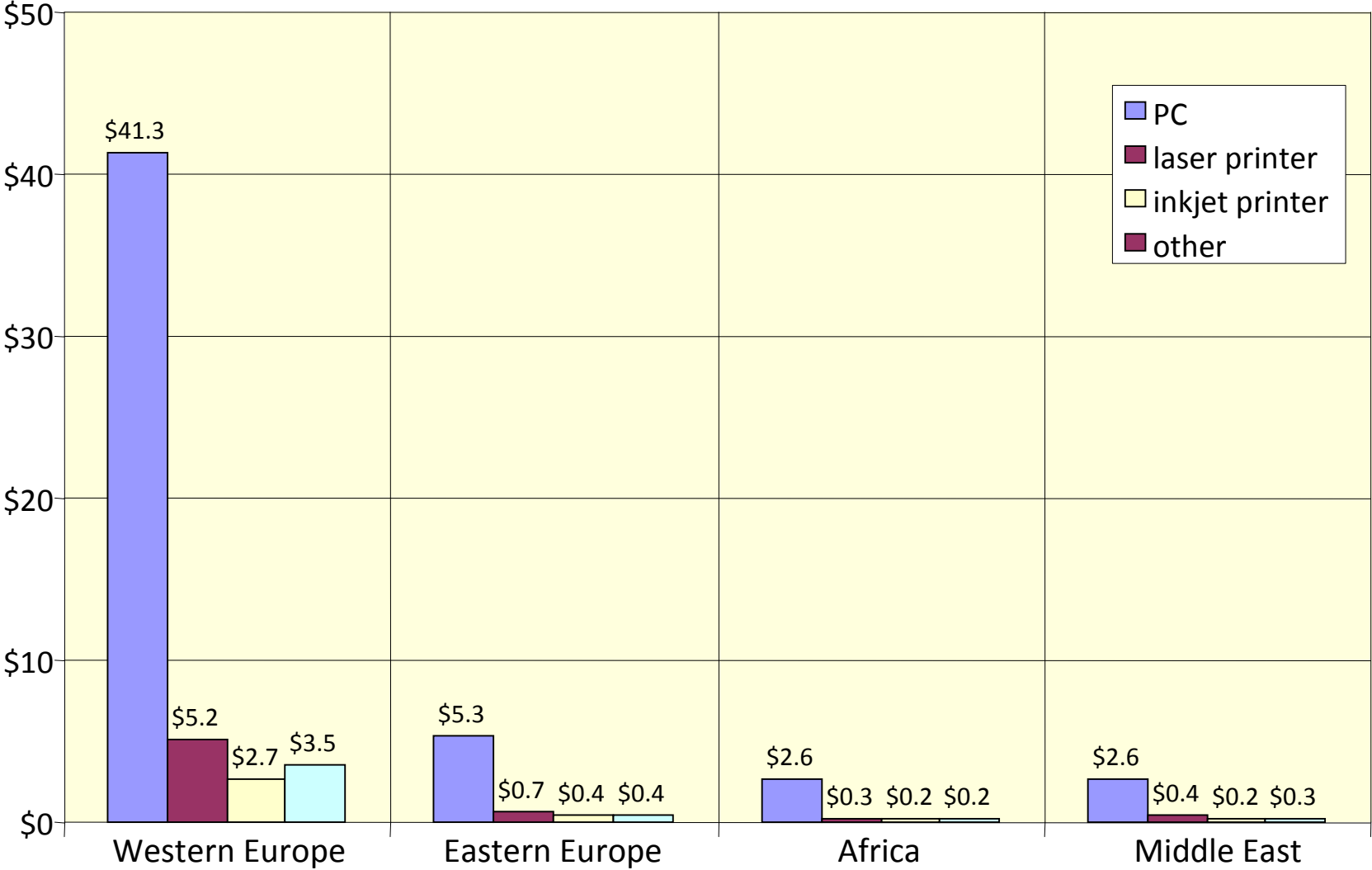
Agenda

- Client device markets
- The data center and enterprise hardware markets
- The leading suppliers – Dell EMC, IBM, Cisco, HPE
- Forecasts and summary

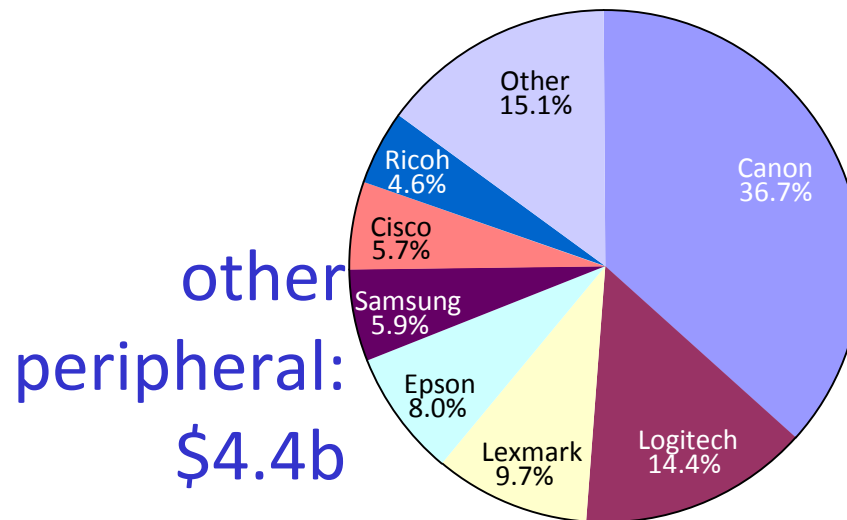
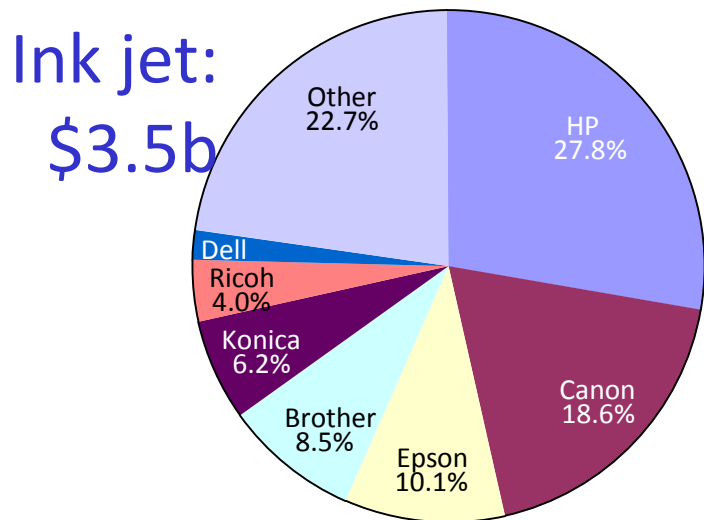
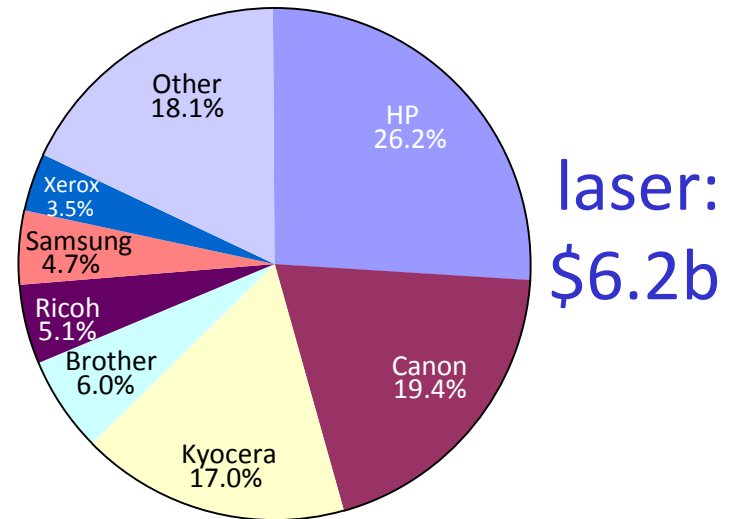
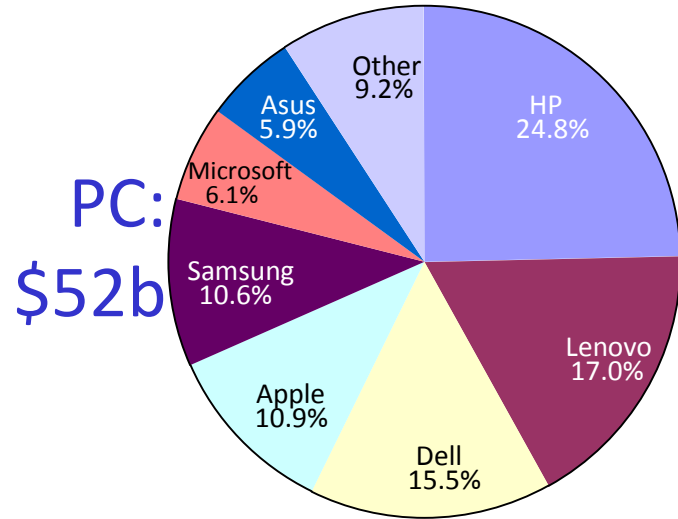
Client device spending (\$ billion) by region – year to June 2018



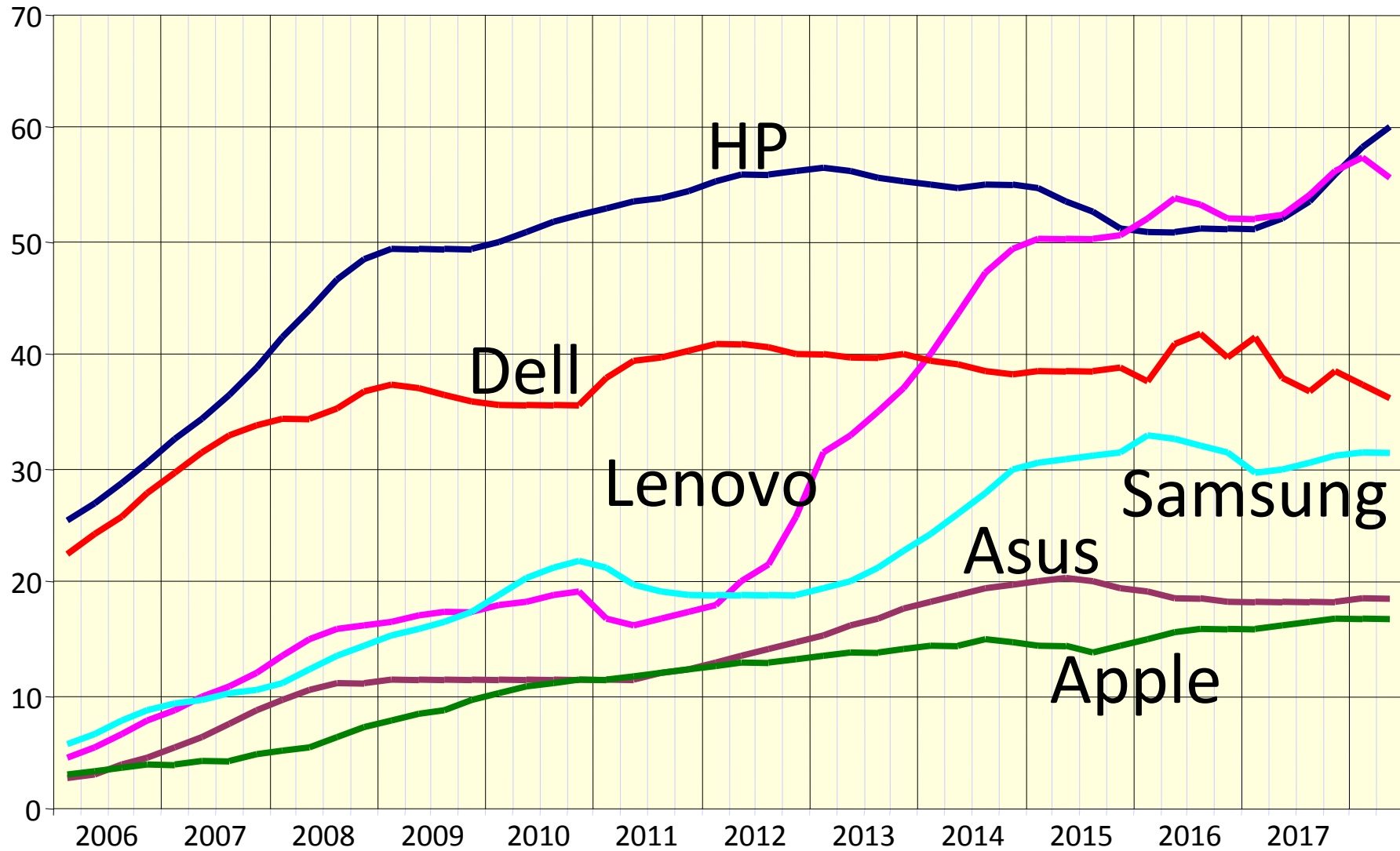
EMEA client device spending (\$ billion) by sub-region and type – year to June 2018



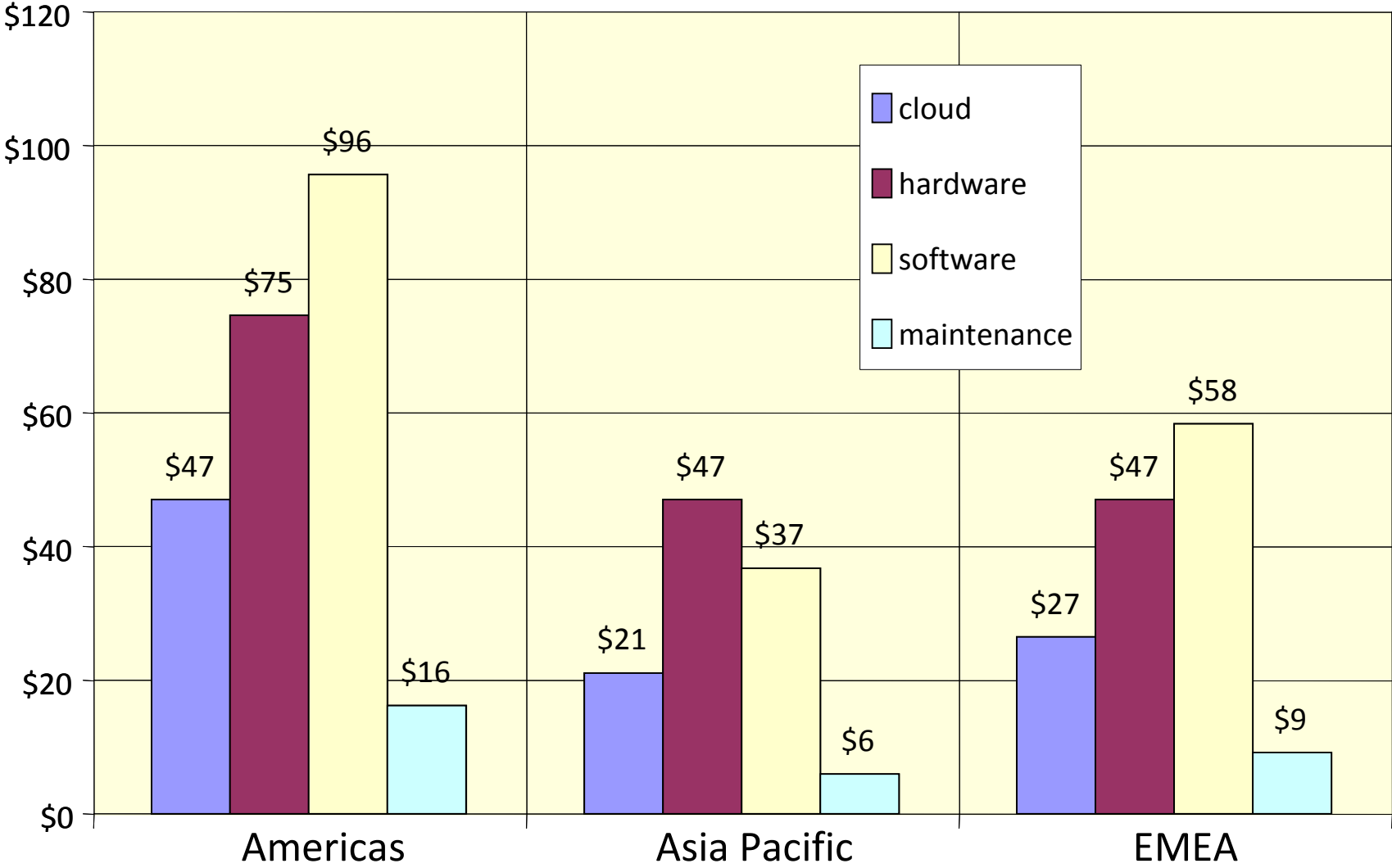
EMEA client device market shares (\$ billion) by type – year to June 2018



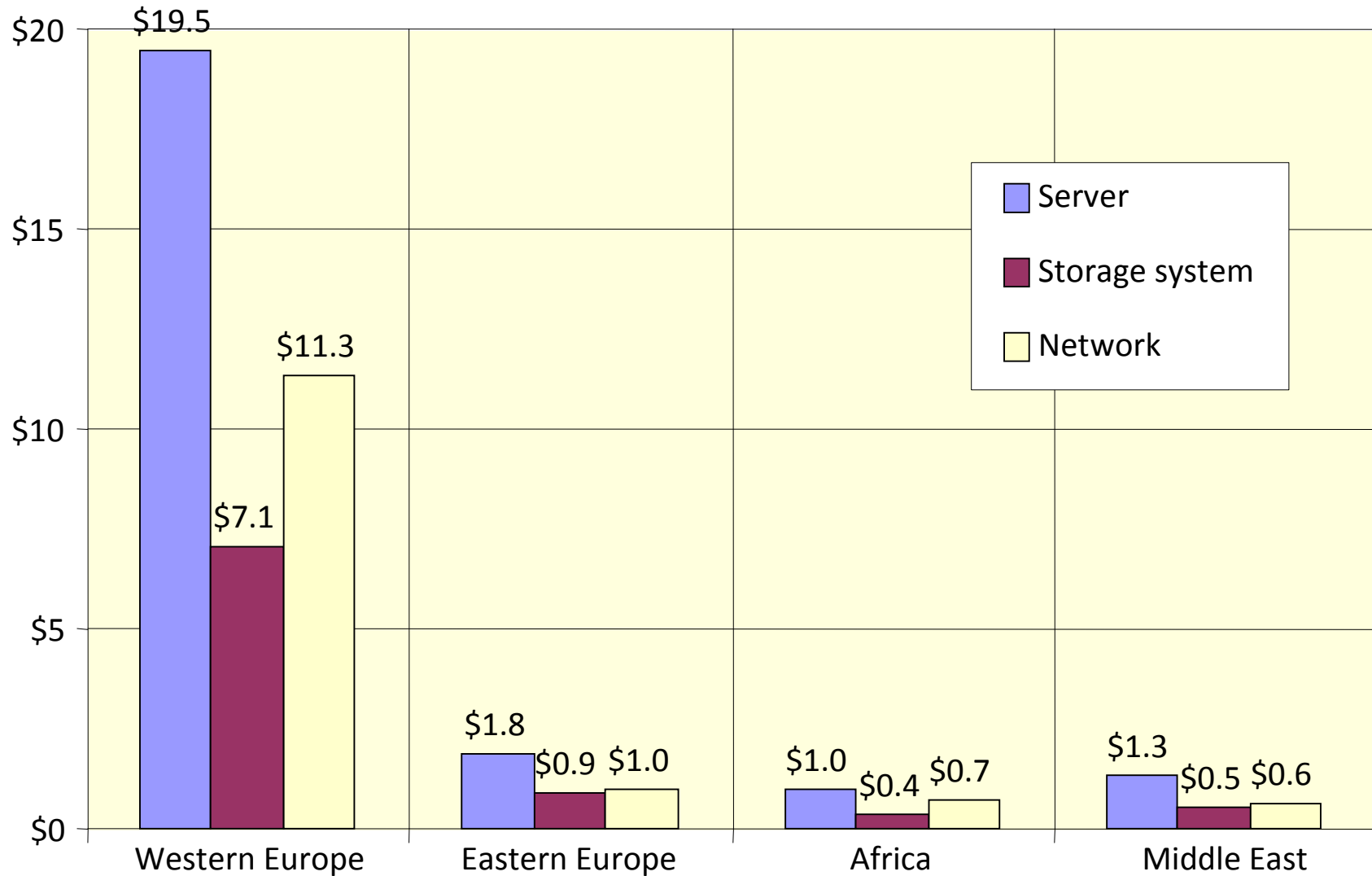
EMEA PC installed base (million) – leading vendors – 2006-2017



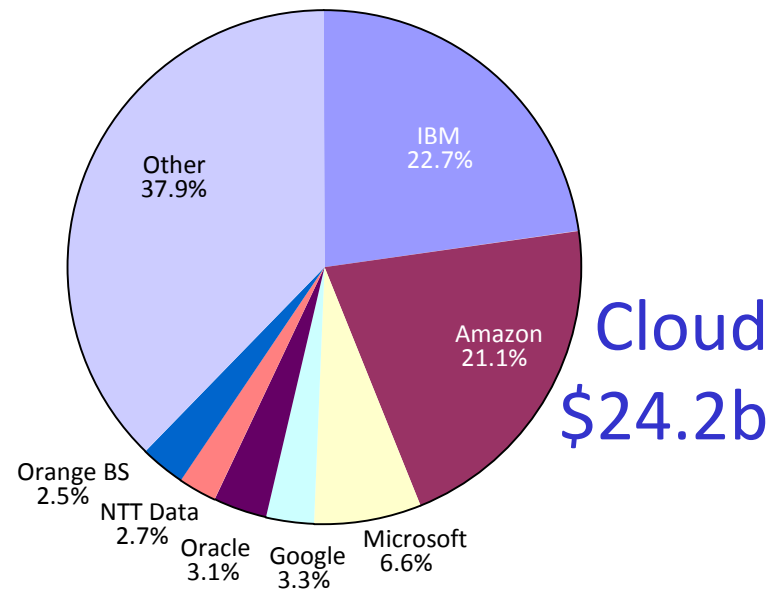
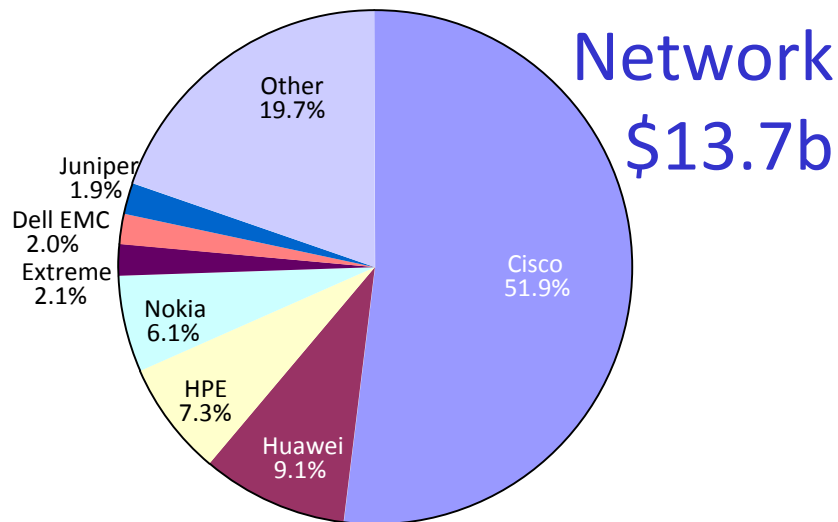
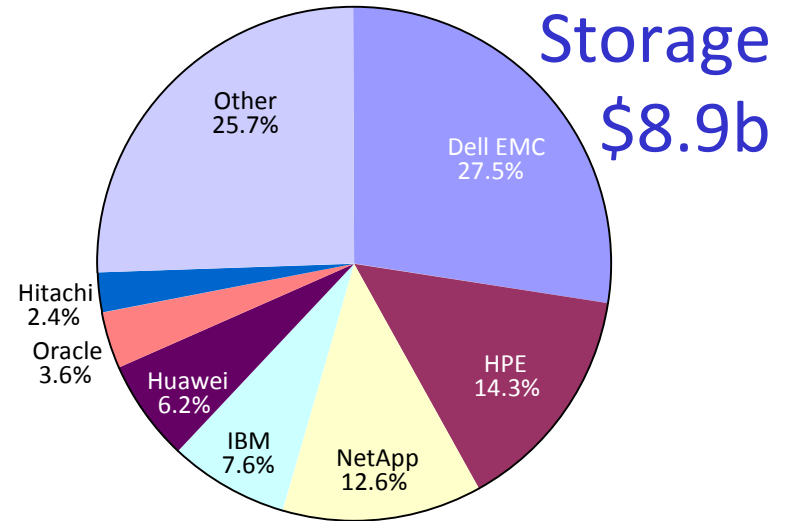
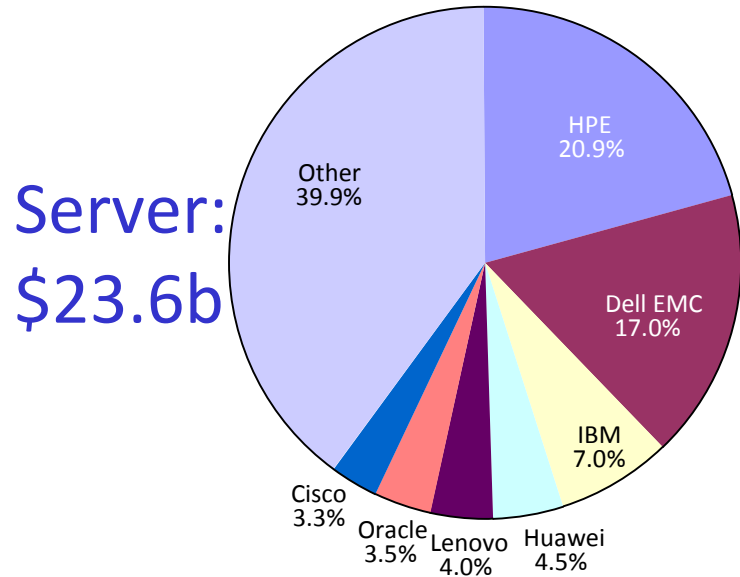
Global data center spending (\$ billion) by region – year to June 2018



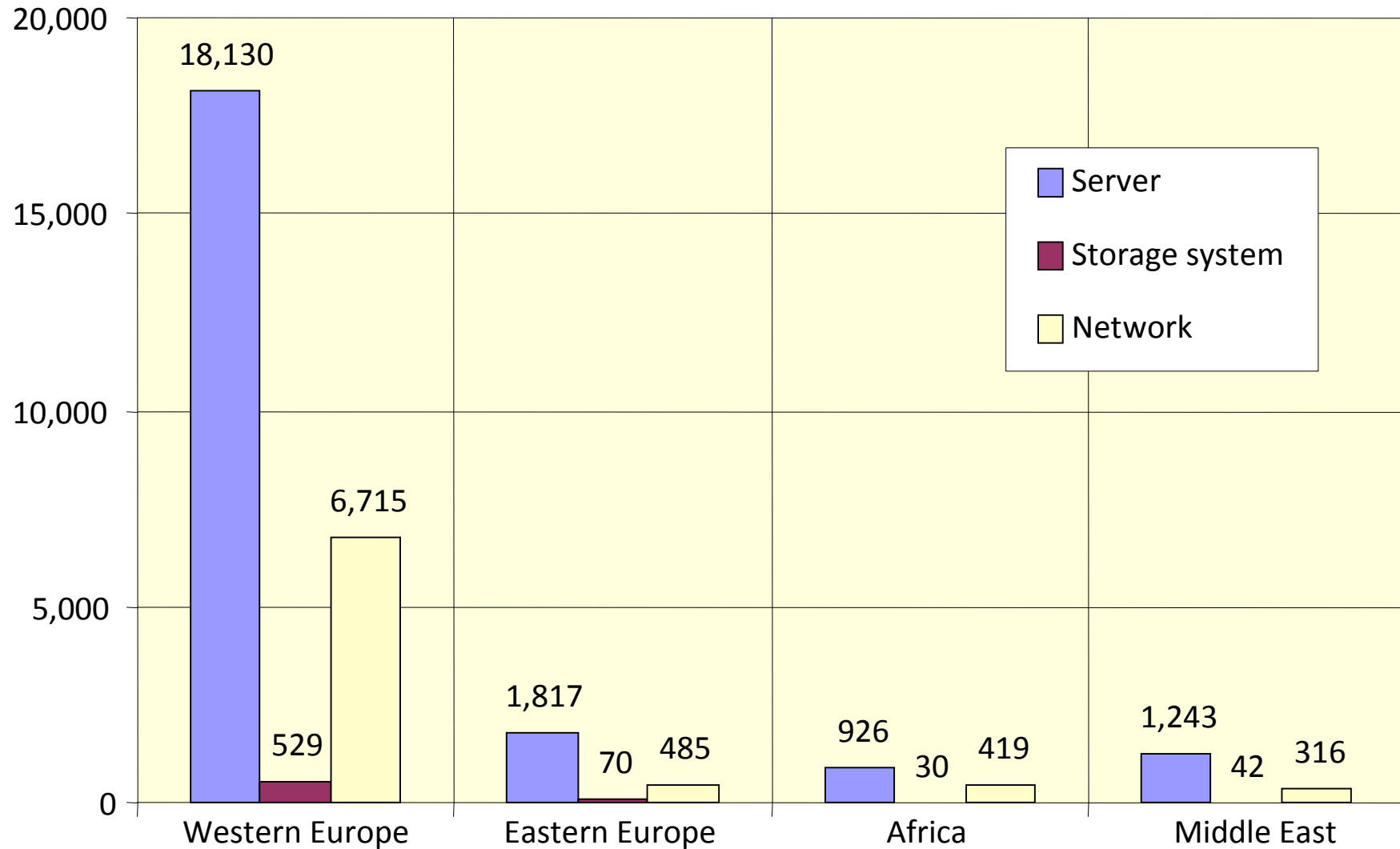
EMEA enterprise hardware spending (\$ billion) by sub-region and type – year to June 2018



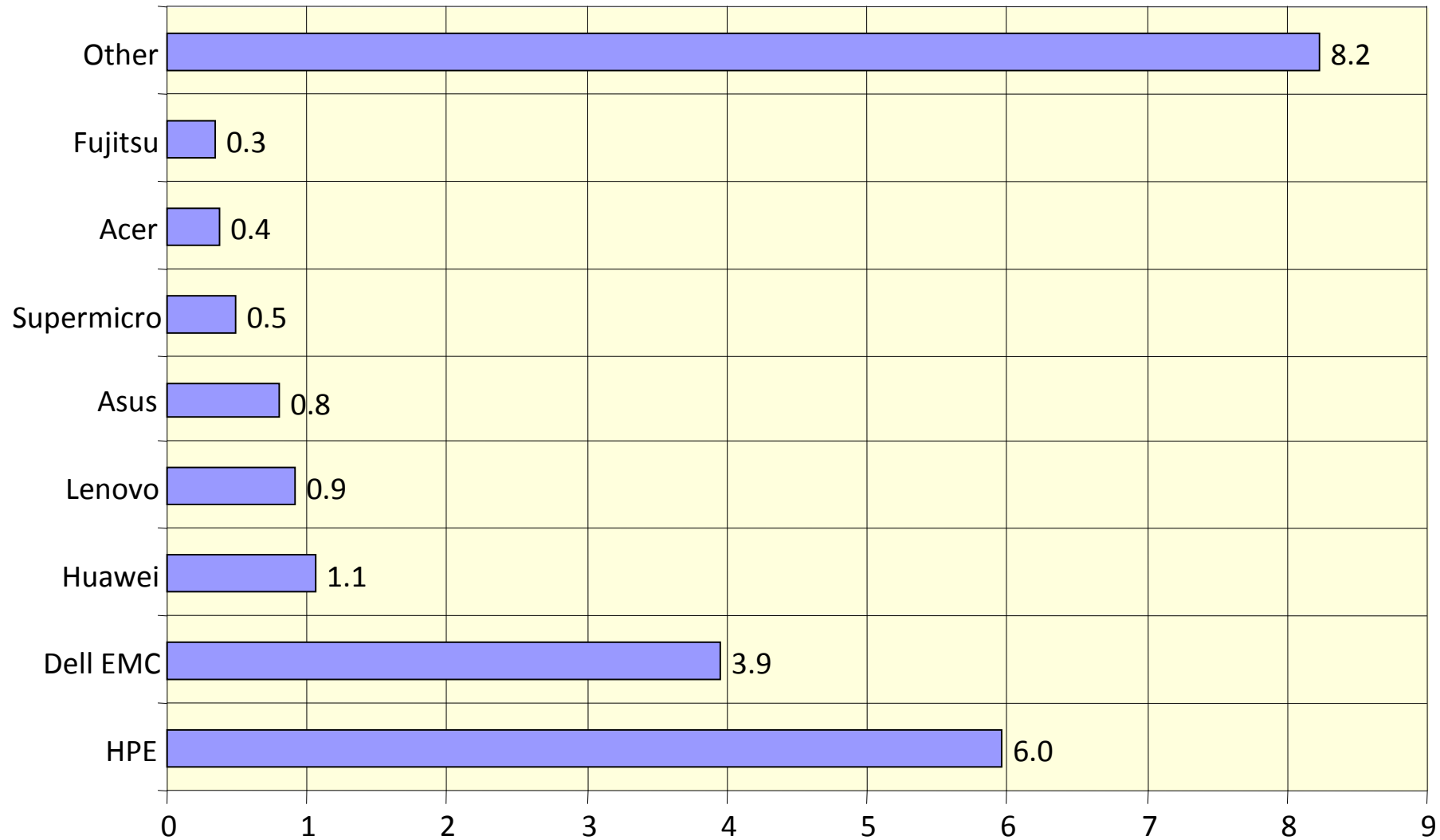
EMEA data center market shares (\$ billion) by type – year to June 2018



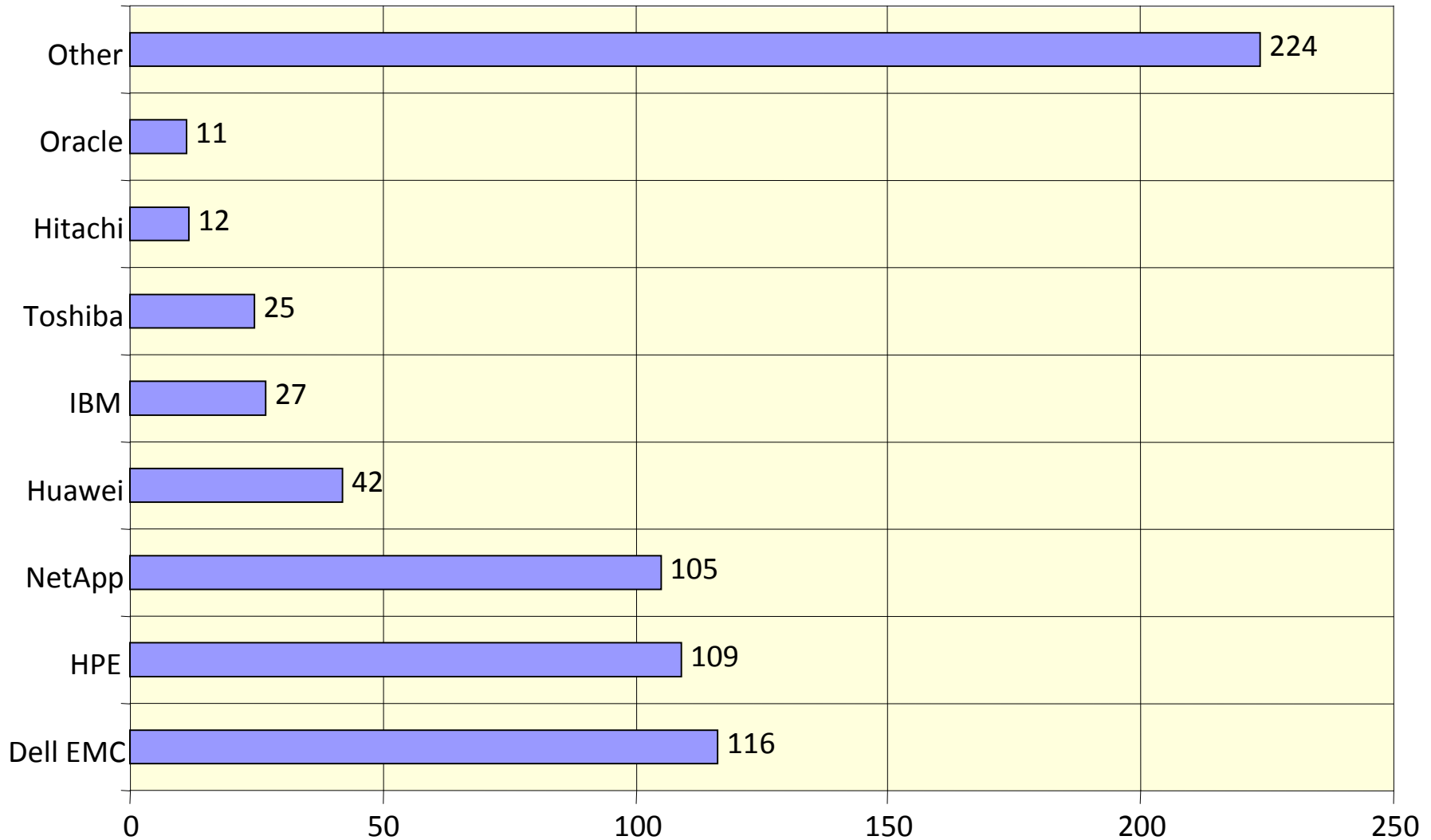
EMEA enterprise hardware installed base (thousands) by region and type – year to June 2018



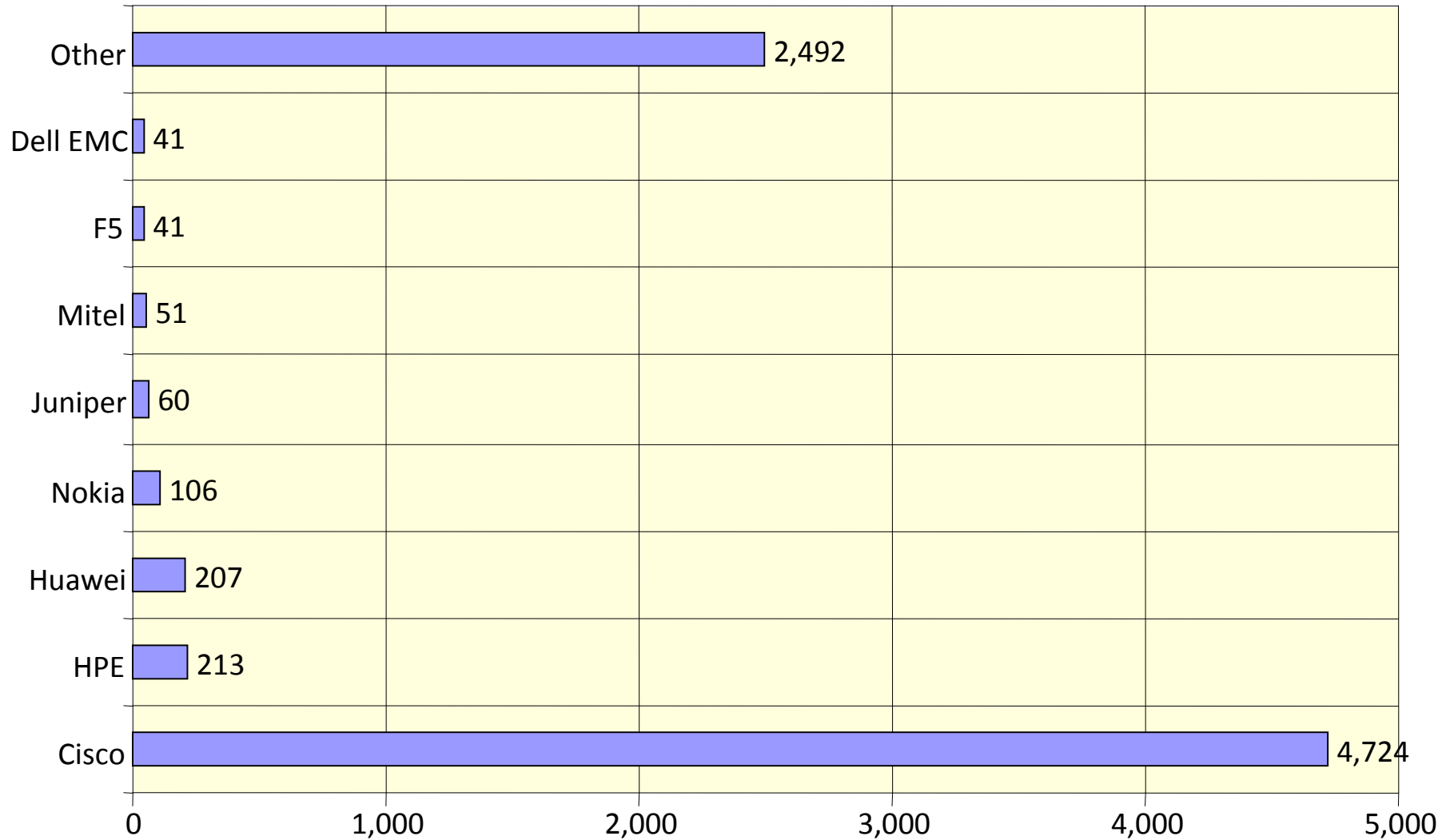
EMEA server installed base (millions) by supplier – year to June 2018



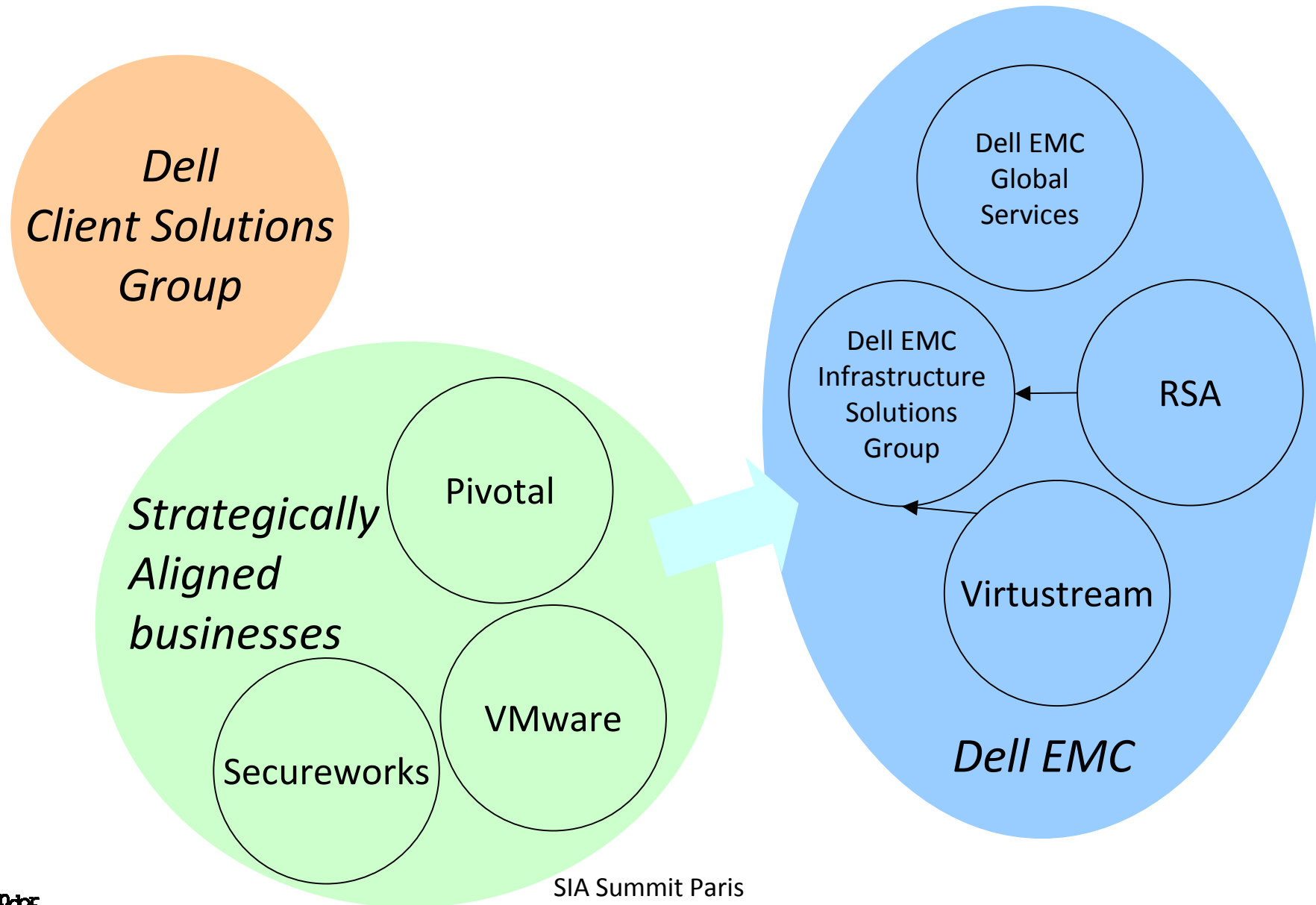
EMEA storage system installed base (thousand) by supplier – year to June 2018



EMEA network installed base (hundred thousand) by supplier – year to June 2018

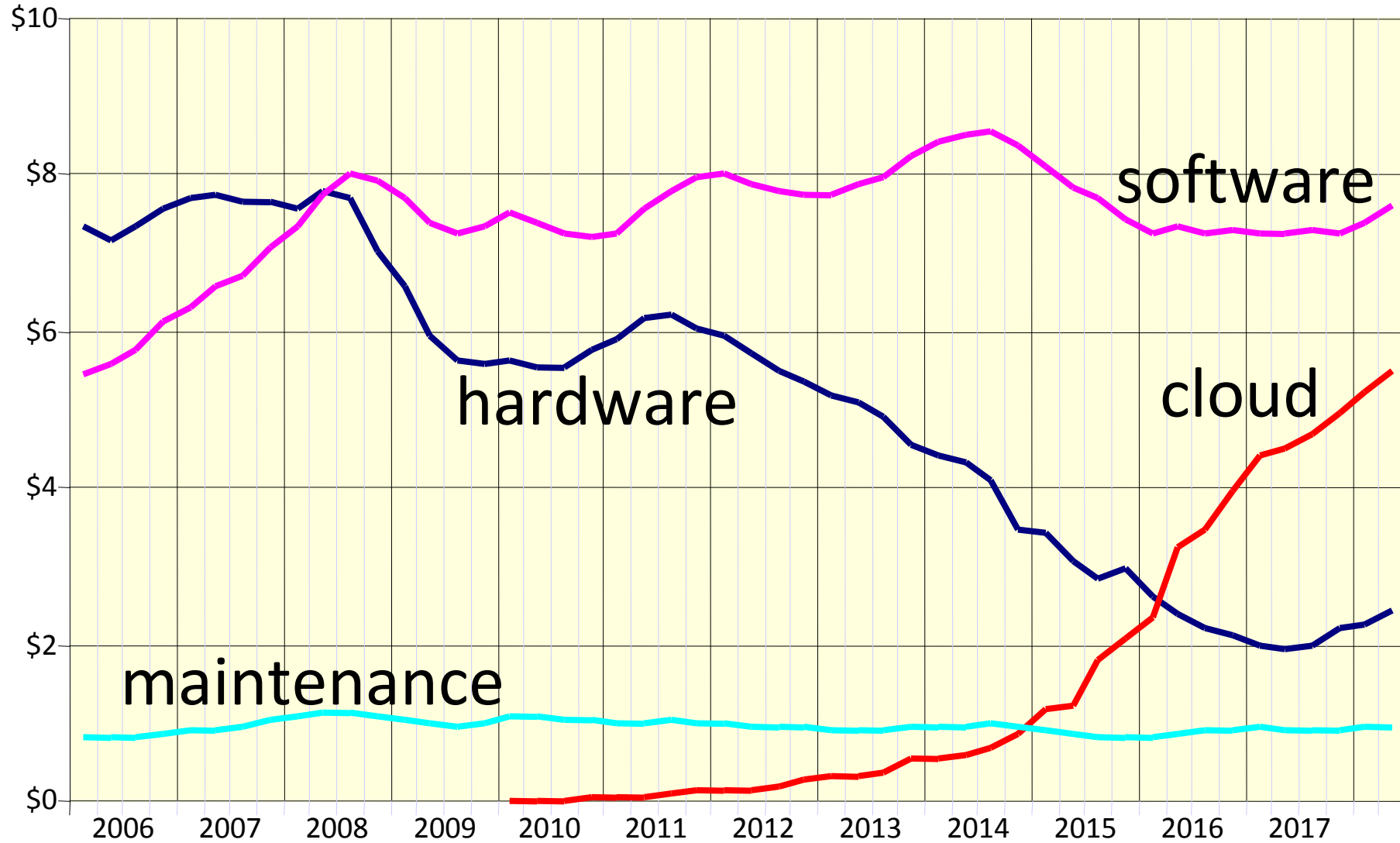


Dell Technology creates a private stable



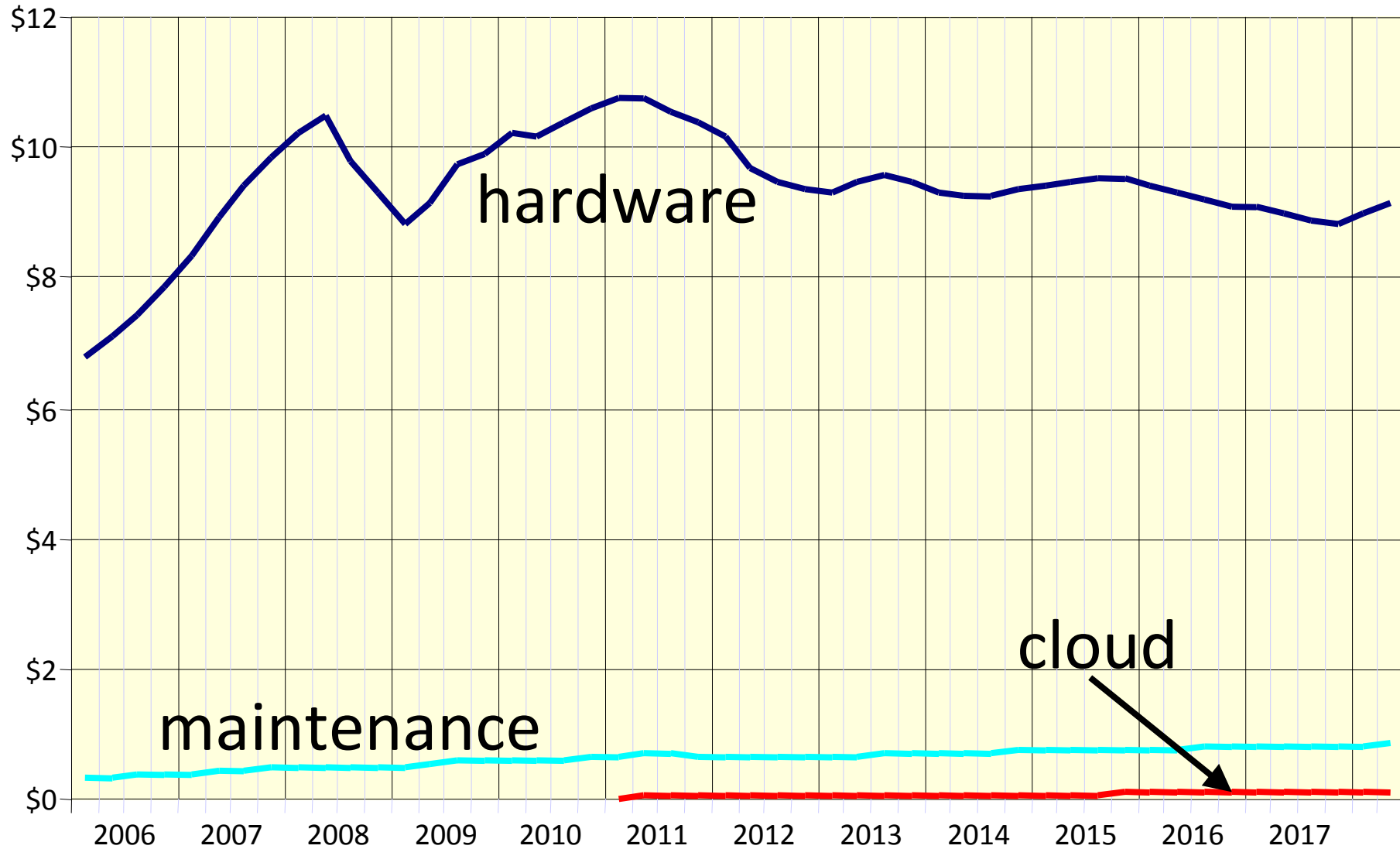
IBM cloudifies

(EMEA revenues by type - 2006-2018 – rolling 4-q analysis)

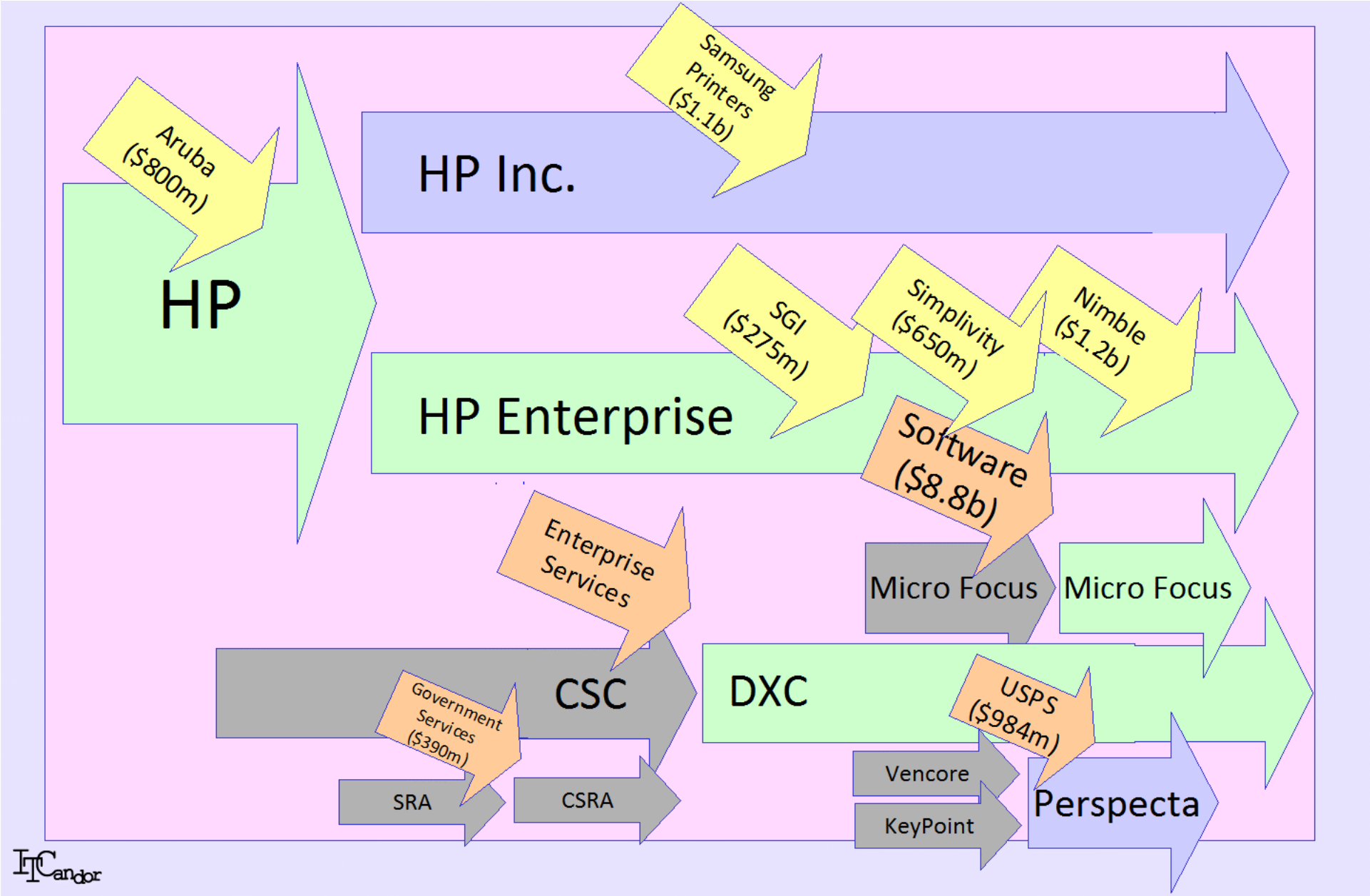


Cisco stays the network course

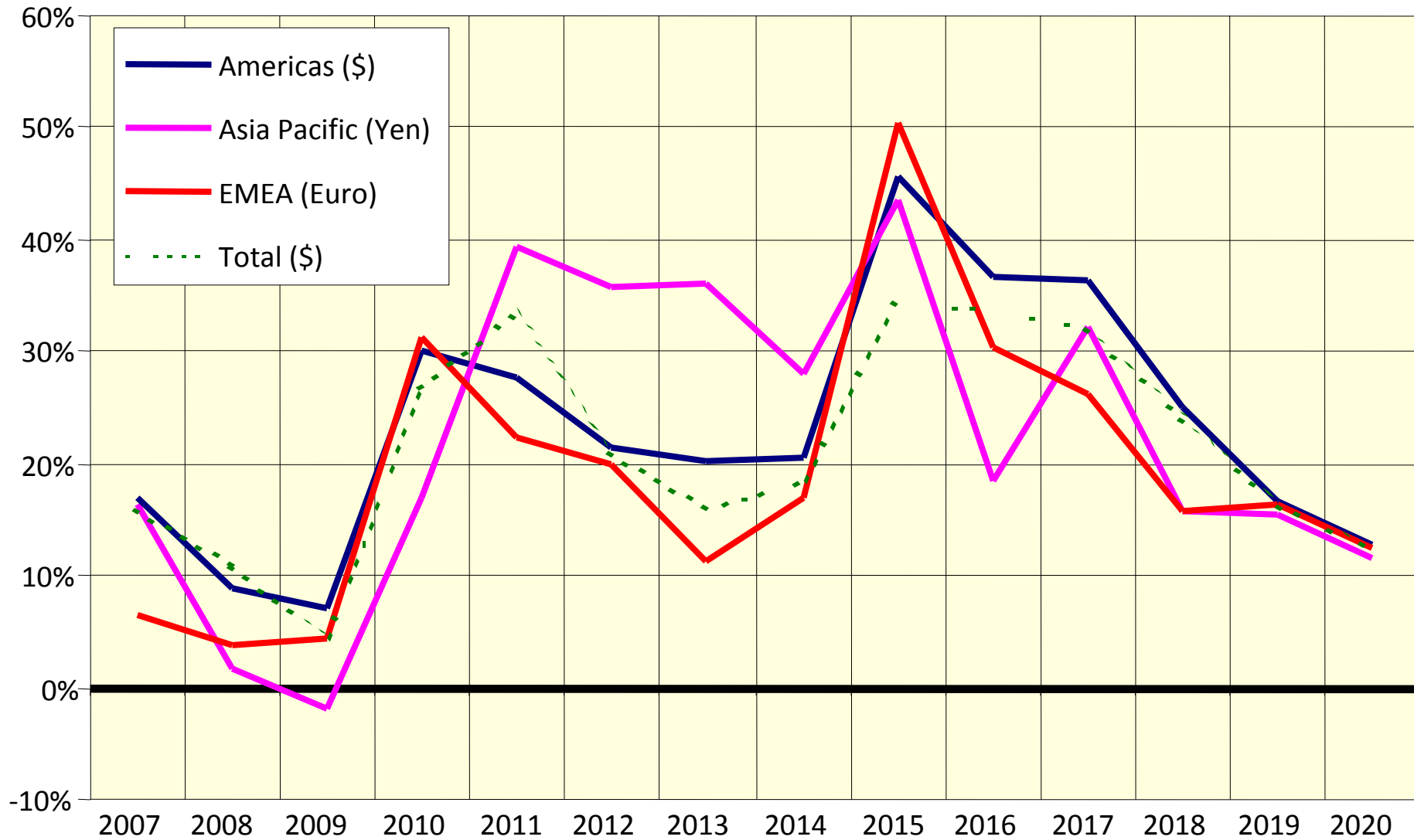
(EMEA revenues by type - 2006-2018 – rolling 4-q analysis)



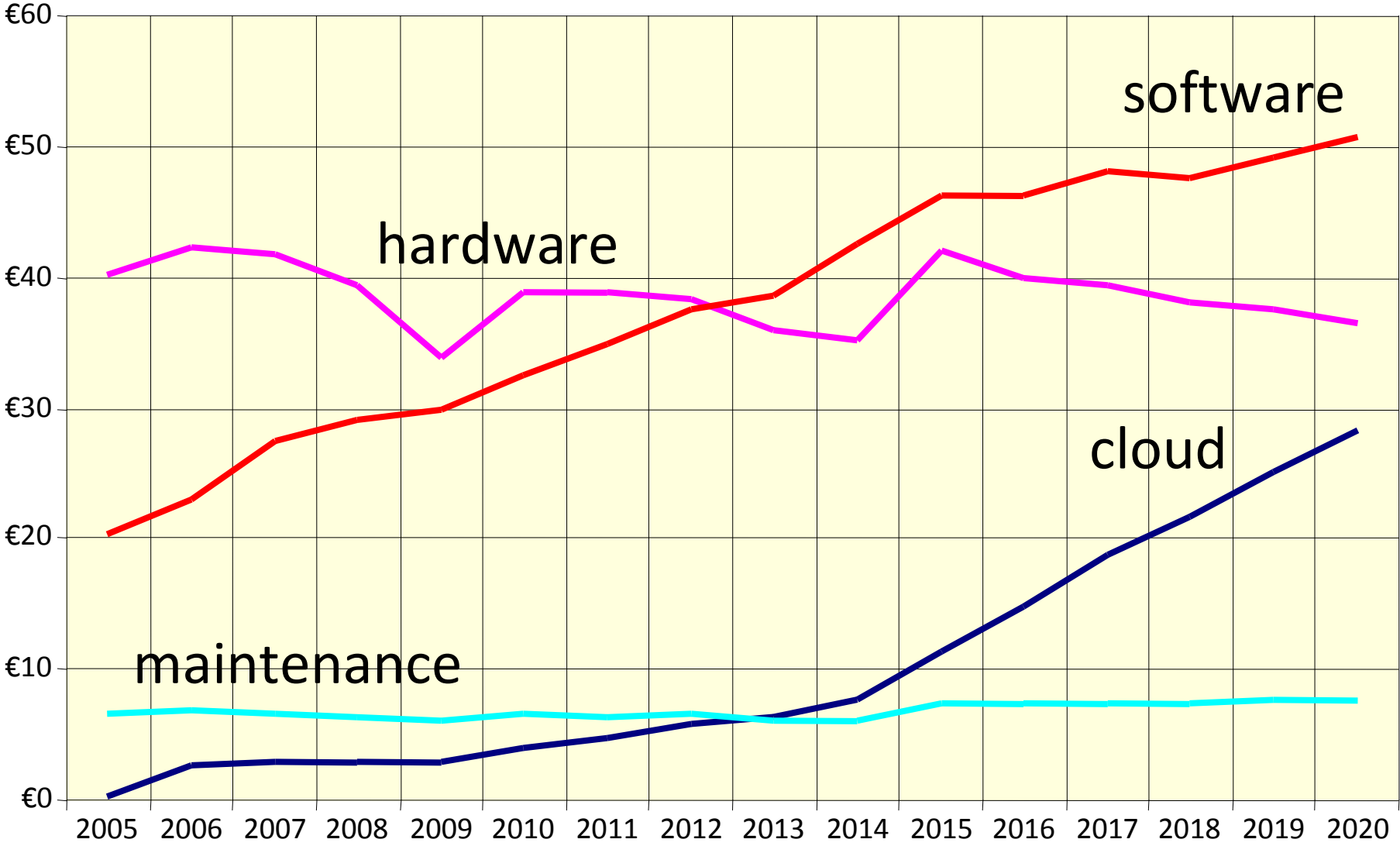
HP splits and disposes



Cloud spending growth (local currencies) by region and year – 2007-2020



EMEA data center spending (€ billion) by offering and year – 2005-2020



Summary

Global Service Delivery – OEMs in EMEA

- EMEA is a continent of nations and regions – WE the largest, ME the fastest growing
- PCs dominate the peripheral market
- Data center spending in EMEA is more ‘software defined’ than A/P
- Data center OEMs – strategic diversity
- CSPs are smaller, use less self-built systems
- Brexit and other ‘new nationalism’ is affecting business confidence – trade wars will make it worse

A map of Europe with country names labeled in red. The map is centered on the continent and shows the outlines of all major European countries. The text is overlaid on the map.

Thank you!

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