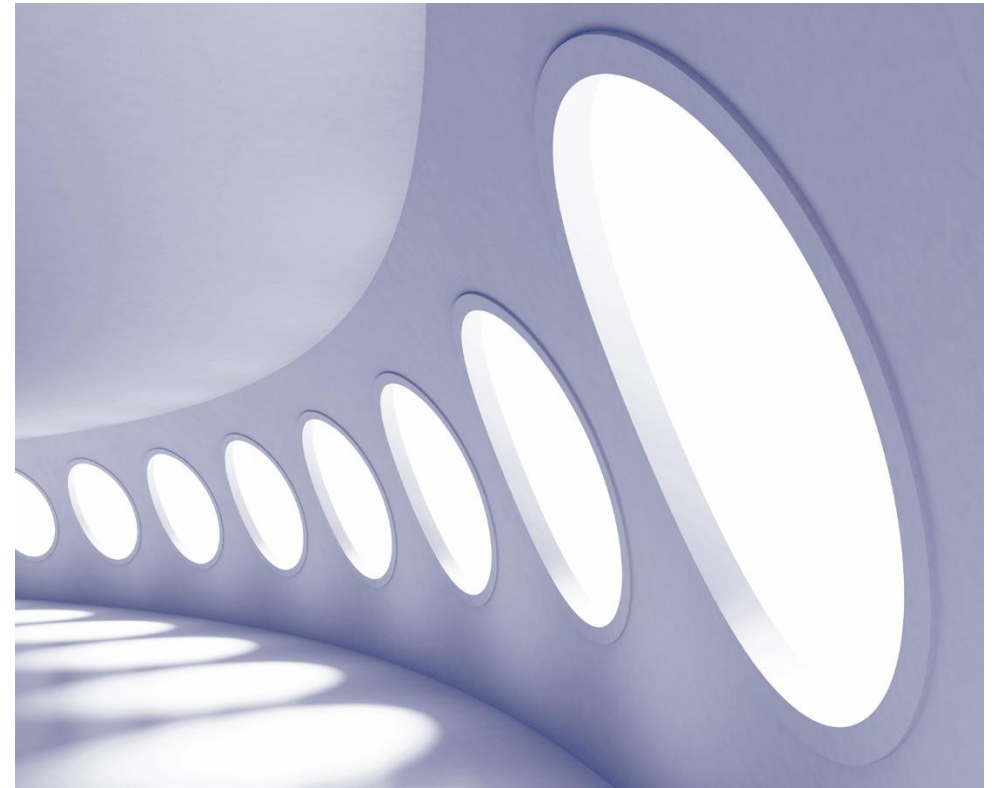


Think 2032!

**Position for
ICT everywhere**



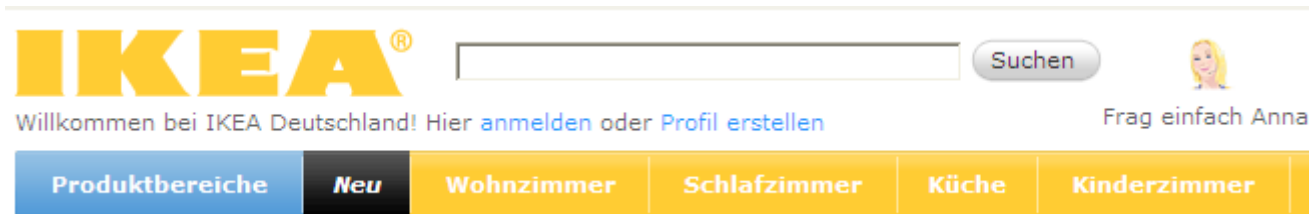
Content

1. Sneak Preview
2. The Future ICT Ecosystem
3. ICT meets industries
4. Think 2032!
5. Take Aways

Content

1. Sneak Preview

Do you know Anna?



Sneak Preview – Smart Agents

The screenshot shows the IKEA website interface. At the top, the IKEA logo is on the left, followed by a search bar with the text 'Suchen'. To the right of the search bar, there is a user profile icon and the text 'Frag einfach Anna!'. Further right, there are links for 'IKEA in deiner Nähe', 'IKEA FAMILY', and 'Warenkorb'. Below the search bar, there is a navigation bar with categories: 'Produktbereiche', 'Neu', 'Wohnzimmer', 'Schlafzimmer', 'Küche', 'Kinderzimmer', 'Badezimmer', and 'We'. The main content area is titled 'Textilien' and features a sidebar on the left with various product categories like 'Inspiration', 'So gehts ...', 'Serie(n)', 'Neuheiten Textilien', and 'Produkte'. The main area displays a grid of carpet products with their names and prices. A chatbot overlay on the right side, titled 'Frag einfach Anna', shows a female agent in a yellow IKEA uniform. The chatbot has a message: 'Du hast gesagt: Welche Wollteppiche habt Ihr?' and a response: 'Hier findest du eine Übersicht unserer Teppiche.' There is a 'Senden' button and a 'Schliessen' button. At the bottom of the chatbot, there is a copyright notice: '© Inter IKEA Systems B.V. 1999 - 2010'.

Produktbereiche **Neu** Wohnzimmer Schlafzimmer Küche Kinderzimmer Badezimmer We

Textilien

Alle zeigen v Relevanz v

Vergleich anzeigen Übersicht

	ALVINE Teppich flach gewebt 149,00	ALVINE RAND Teppich flach gewebt 149,00	ALVINE RUTA Teppich flach gewebt 149,00	ANDREA Teppich Kurzflor 179,00
	ANDRUP Teppich flach gewebt 29,99	BORRIS Fußmatte 0,49	DRAGÖR Teppich flach gewebt 29,99	EGEBY Teppich flach gewebt 59,00

Frag einfach Anna

Du hast gesagt: Welche Wollteppiche habt Ihr?

Hier findest du eine Übersicht unserer Teppiche.

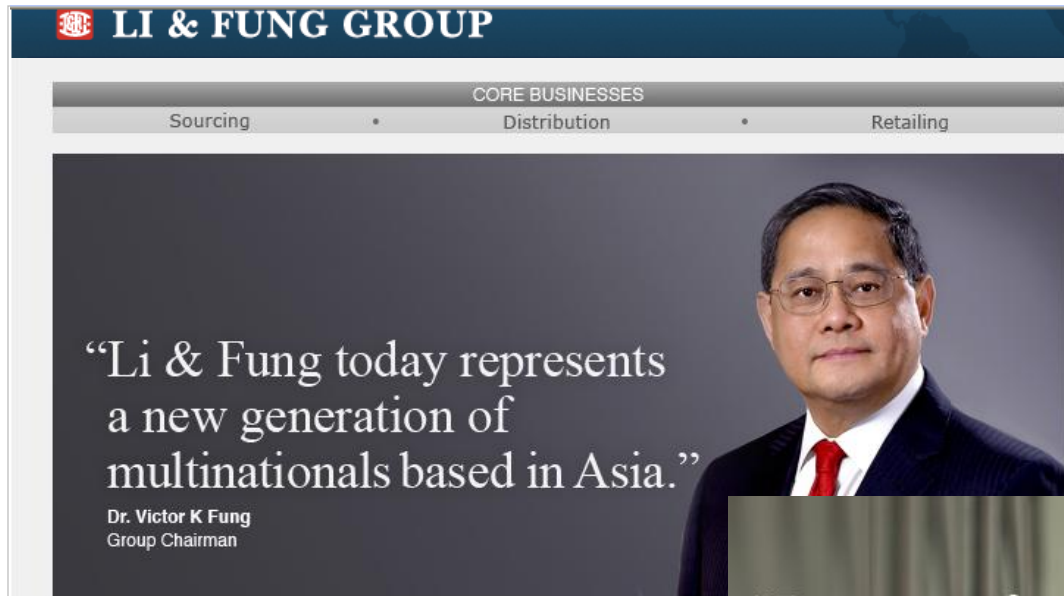
Senden

Schliessen

© Inter IKEA Systems B.V. 1999 - 2010

Sneak Preview – Smart Business Networks

Business networks will become increasingly smart and transform the economy. Li & Fung has reached the 1st level of smartness already.



LI & FUNG GROUP

CORE BUSINESSES

Sourcing • Distribution • Retailing

“Li & Fung today represents a new generation of multinationals based in Asia.”

Dr. Victor K Fung
Group Chairman

Li & Fung Group

- 16 bn \$ revenue in 2009
- 35.000 people
- designs, develops and sources consumer products for retailers worldwide
- customers: Walmart, Avon, Nike, Toy“R“Us, ...

Business network with asset light model

- no own factories or equipment
- orchestrates a network of 12.000 suppliers in more than 40 economies with 8000 agents



“Because of our asset-light model, our biggest investment is in people.”

Dr. William K Fung
Group Managing Director, Li & Fung Limited

ICT enables industrial convergence

A couple of Smart Business Networks have developed comprehensive business models overarching 'traditional industry' segments by distinct Business Operating Systems.



JIT-production of food and airline logistics (e-Gatematrix)



Linking insurances with repair



NaturaHerstel
snel en vakkundig uw schade hersteld

Allianz Nederland Schadeverzekering

Connecting insurance claims with home appliances

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THE ALL-NEW KINDLE
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★★★★★ (467 customer reviews)

Kindle is our #1 bestselling item for two years running. It's also the most-wished-for, most-gifted, and has the most 5-star reviews of any product on Amazon.com.

Price: **£109.00** & this item **Delivered FREE in the UK** with Super Saver Delivery. [See details and conditions](#)

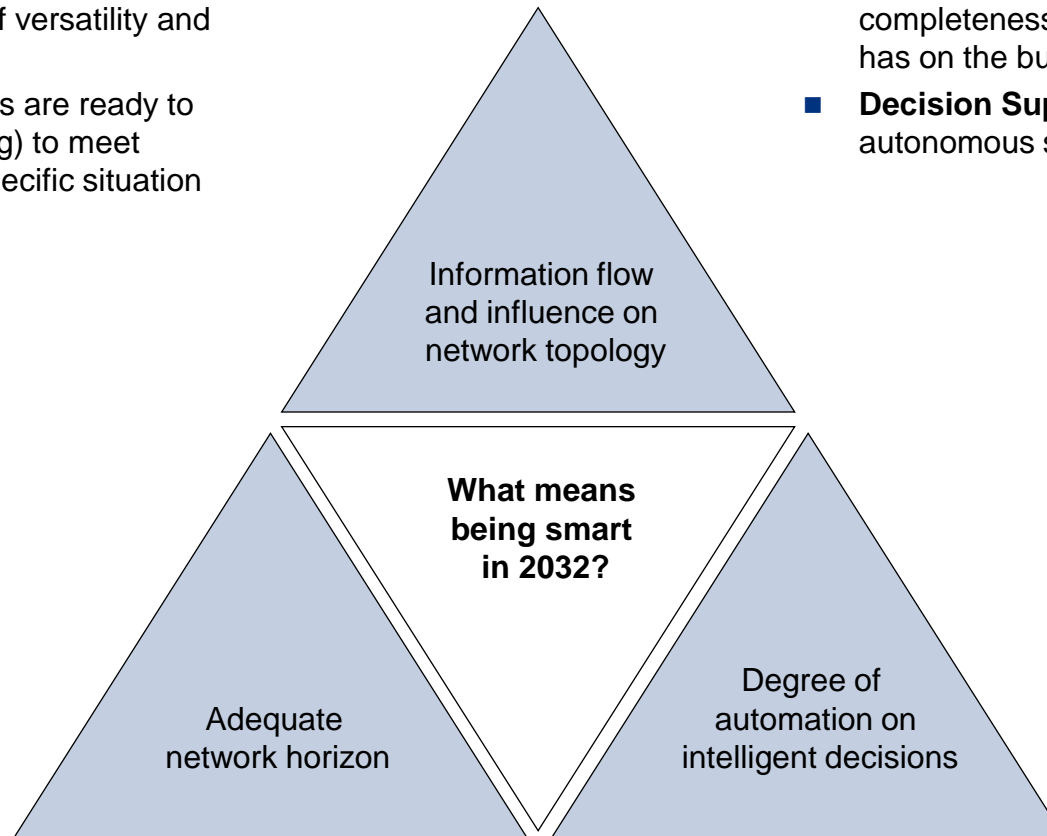
In stock

Key characteristics of Smart Business Networks

Business in a rapidly formed network with anyone, anywhere, anytime regardless of different computer systems and business processes.

- Business **modularity** is key as it brings the benefits of versatility and agility.
- **Plug'n'Play** – actors are ready to connect rapidly (plug) to meet requirements of a specific situation (play).

- **Network horizon:** the degree of completeness of information that a firm has on the business network
- **Decision Support Systems (DSS)** and autonomous software agents



Content

2. The Future ICT Ecosystem

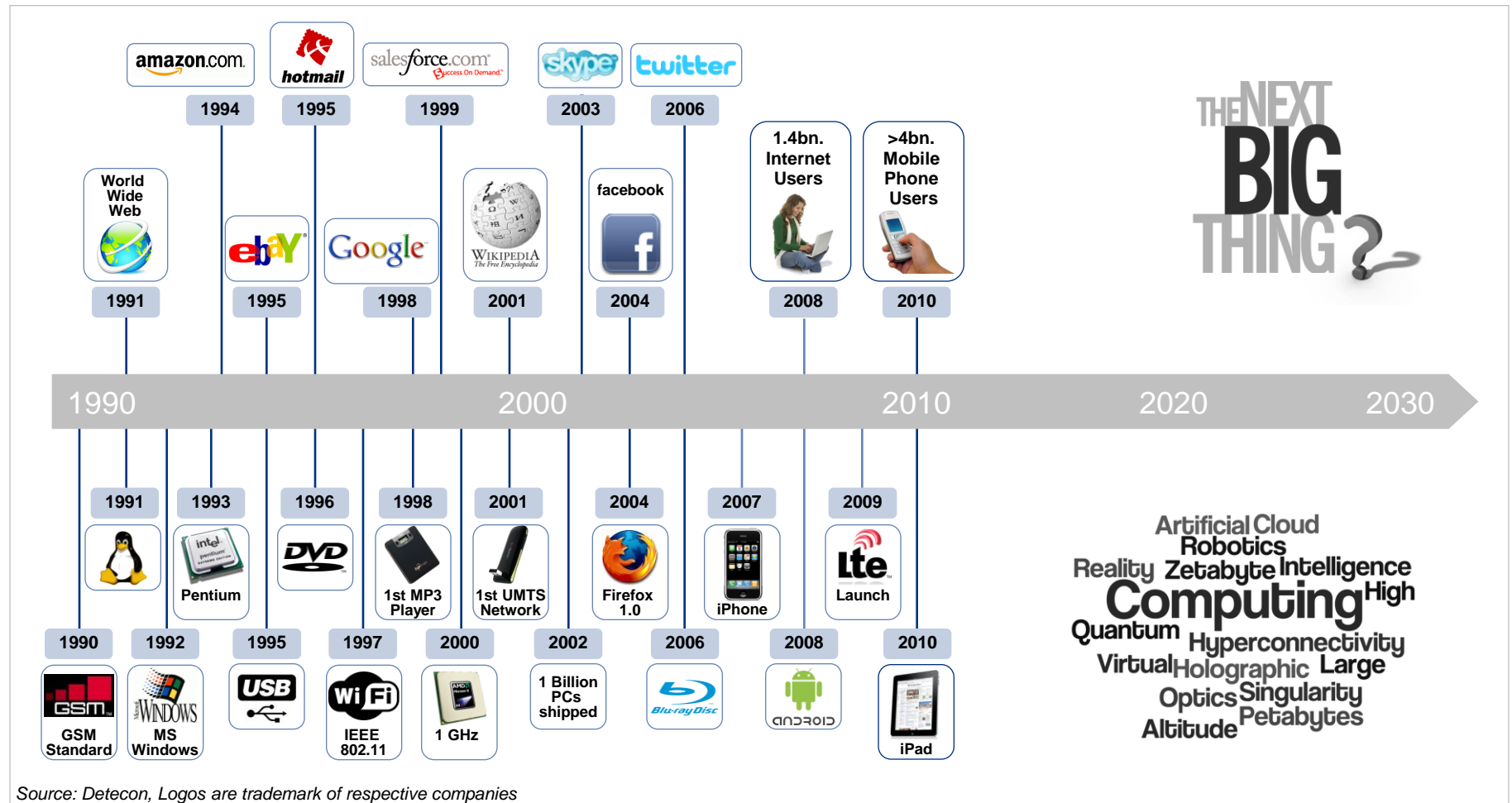
The Future ICT Ecosystem

From the mega trends in the ICT eco-system six ICT core beliefs result.

- 1 The economic and ICT center of gravity moves East!
- 2 The Triad ages and ICT masters the challenges!
- 3 Mega- cities emerge with ICT as a competitive differentiator!
- 4 In a globalized economy ICT paves the way for SME biz!
- 5 The era of smart business networks is to come!
- 6 Smart agents have the say in the Internet of things!

From the Past to the Future – An ICT Perspective

By looking back we start to realize how far the global ICT industry has come in the last twenty years and what we can expect from the next two decades.

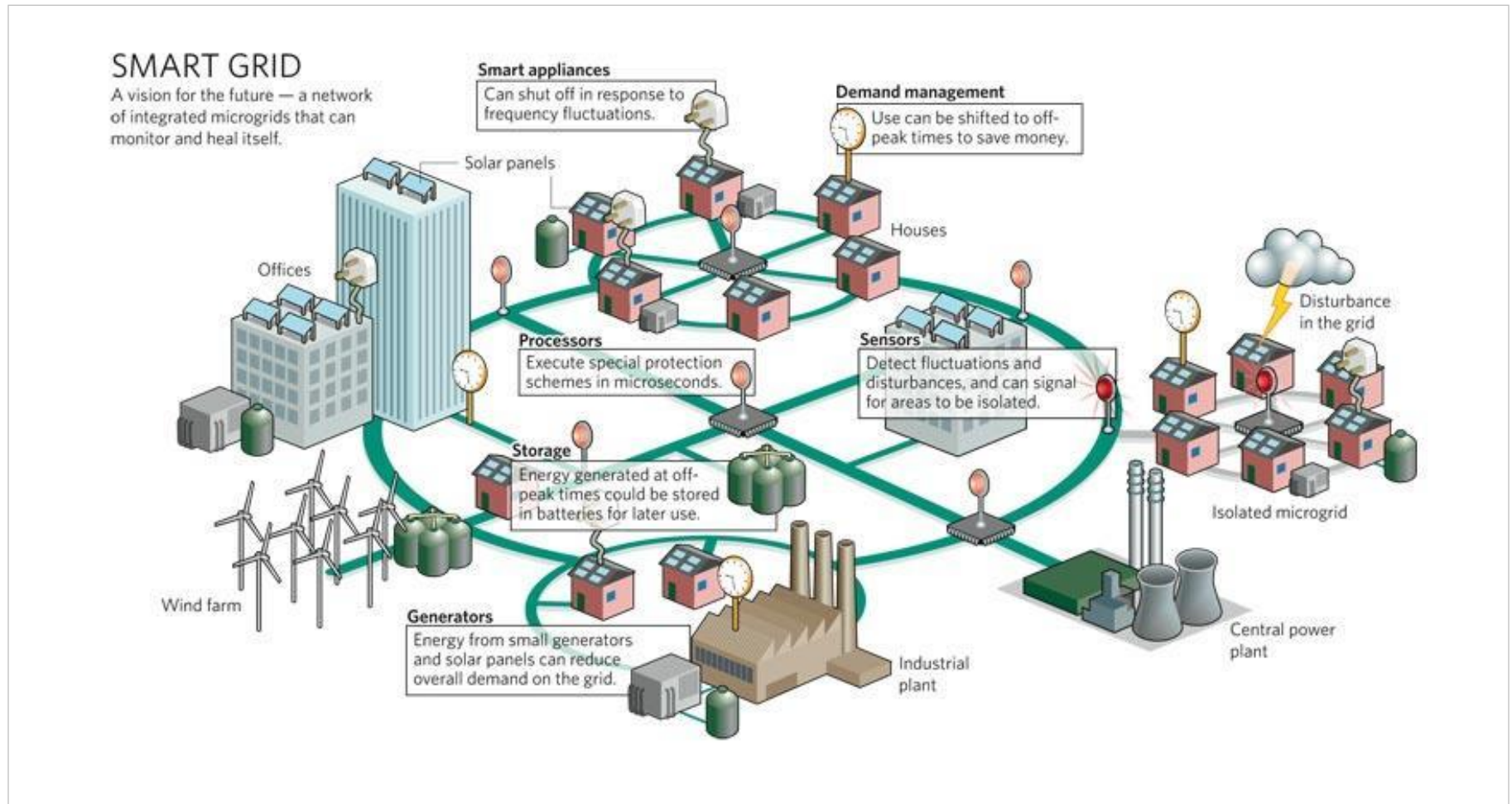


Content

3. ICT meets Industries

ICT meets Energy

Smart Grids..... today's vision will become a reality by 2032 and will revolutionize energy supply and demand.



ICT meets Energy

The convergence of ICT and energy opens up new growth perspectives through innovative business models and service offerings.

Market size & development (US)

- With US\$ 433 billion, worldwide energy market by far outreaches the size of ICT technology market which amounts to US\$ 52 billion
- Market for renewable energy technology growing from US\$ 55.4 billion in 2006 to US\$ 226.5 billion in 2016
- General market trend: stagnating demand, increasing prices

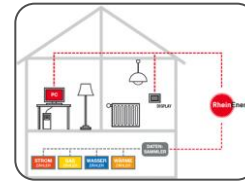
Source: *cleanedge*, 2009

Market Drivers

- ,Unbundling', politically motivated increase of competition
- Climate protection/reduction of CO² emission
- Limited fossil energy resources
- Increasing geo-political dependencies
- Decentralized energy generation
- Advancing digitalization/mature ICT technologies at market relevant costs

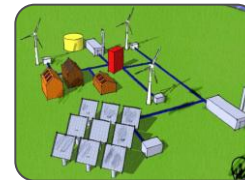
Innovative ICT application fields

2010



Demand Response Management

- Automated, price-dependent mgmt. of energy supply, based on metered capacity and demand profiles
- Combination with Digital Home appliances and applications



Virtual Power Plants

- Centralized, ICT-based management of distributed energy supply & demand assets
- Avoidance of peak loads; less dependency from central energy supply



E-Mobility/Vehicle-to-grid

- Usage of decentralized energy storage
- Less dependency from volatile energy generation
- Decoupling of demand & supply

ICT meets Automotive

Full access to all kind of real time information, multi-media and social network on the move; innovators like BMW are paving the way towards digitally connected cars.

Innovative ICT application fields

2010



Internet in the car

- Route and location information
- Car remote diagnostic etc.
- Seamless digital media



Intelligent traffic management

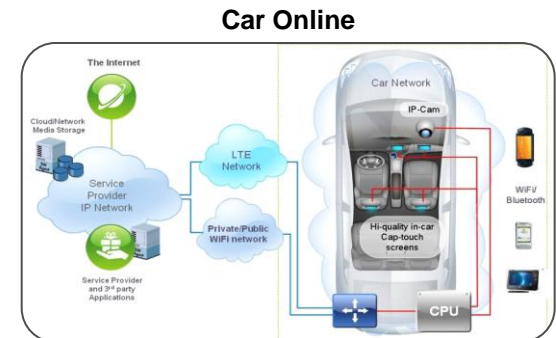
- Centralized ICT based traffic mgmt.
- Traffic management; traffic congestions alerts



Car-to-car connection

- Communication/info exchange between individual cars
- Improved security systems, innovative mobility concepts, commercial services

Examples/market snapshots



ICT meets Health

Medical will be entirely digital. Innovations such as digital pills are underway. While enabling new kinds of applications, implanted microchips raise new privacy issues.

Innovative ICT application fields

2010



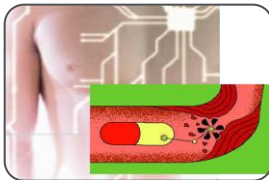
Integrated information networks

- Smart health networks connecting the main participants of the health system
- Comprises data of medical care and supporting processes



DNA sequencing

- Low cost or free access to the results of complete DNA analysis
- Innovative value added services/apps based on Smart Health functions

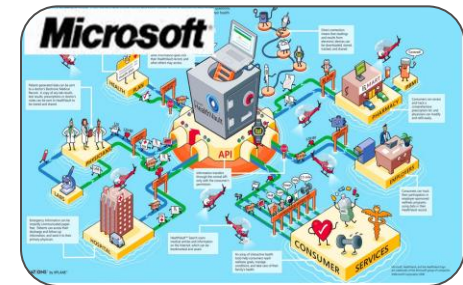


Connected body implants

- Nano-robots: medical surgery on a molecular basis
- Intelligent pills: wireless communication & steering for targeted administration

Examples/market snapshots

Health Network Systems



Body Chips



ICTization

ICT for everyone, everywhere, in virtually every object – that will be the outstanding characteristic of the world of tomorrow.



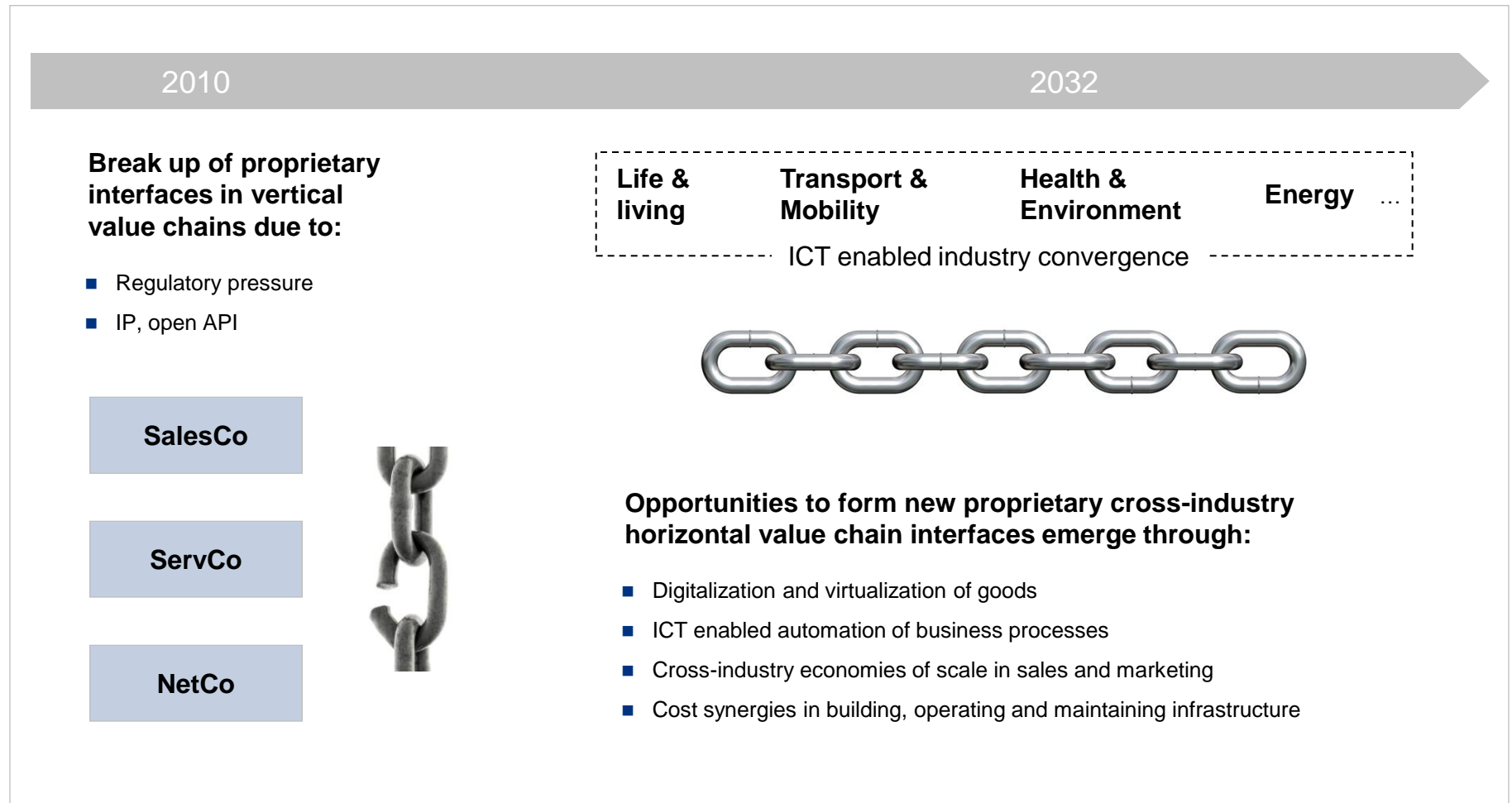
- 1 ICT drives innovation in all areas of life, the Internet of things will be reality.**
- 2 ICT becomes a key production and differentiation factor in almost all industries.**
- 3 Data and IP centric business models transform the economy.**

Content

4. Think 2032!

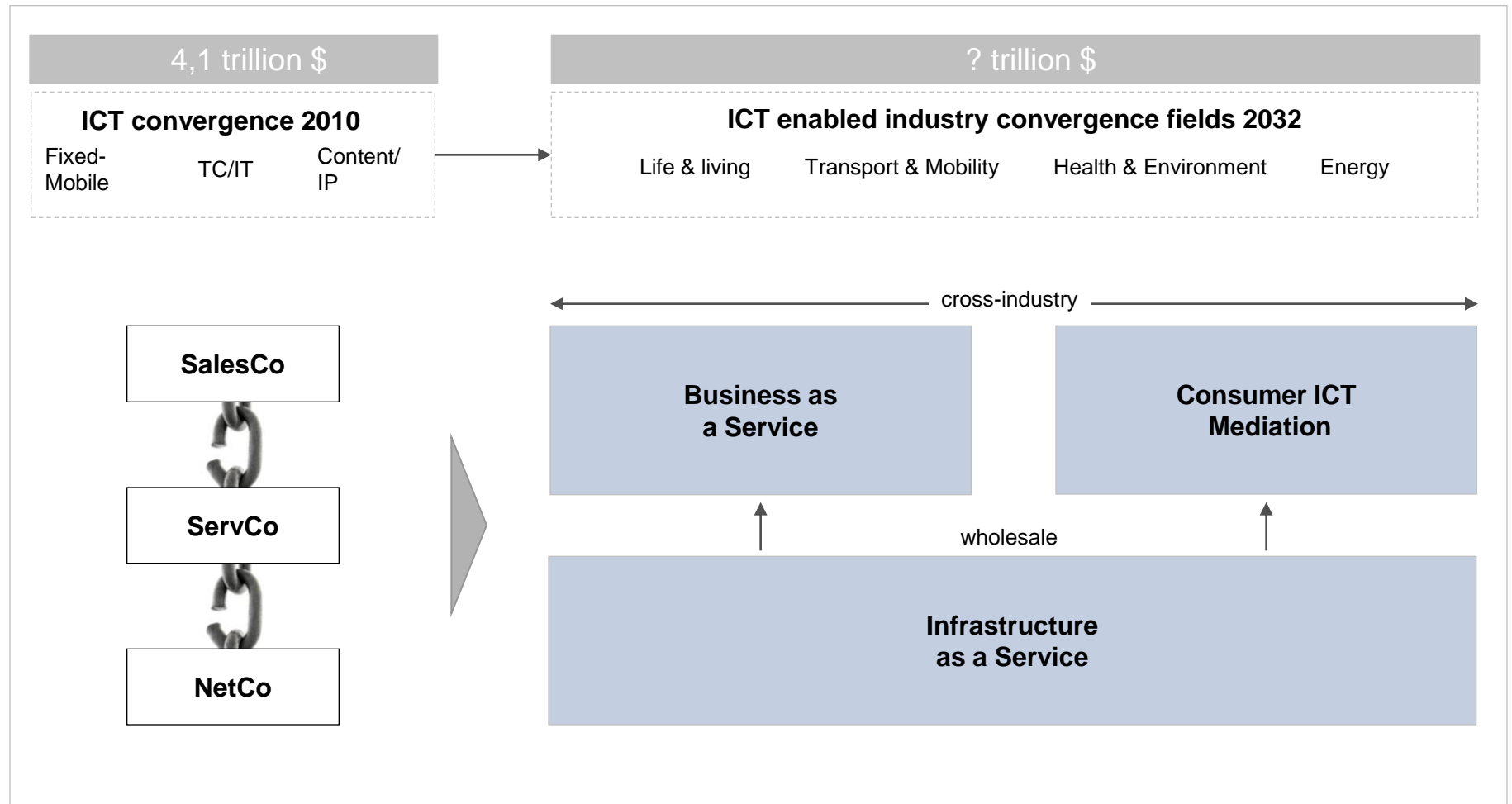
Think 2032! – From Vertical Disintegration to Horizontal Integration

Standardization and opening of value chain interfaces drive vertical disintegration. Horizontal integration emerges due to proprietary cross-industry interfaces.



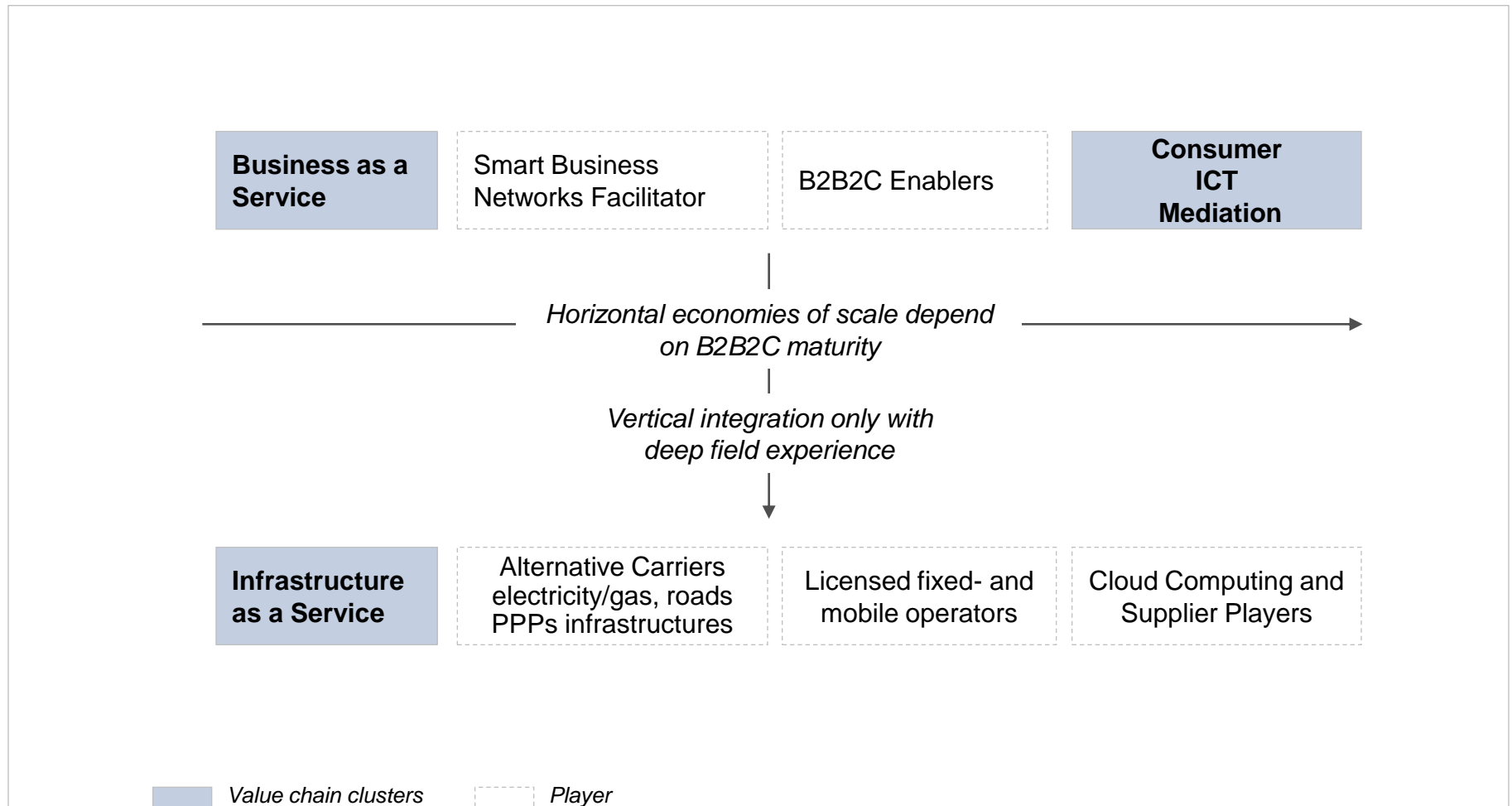
Think 2032! – A New Era of Convergence

The dynamics of ICT-convergence will expand to industry convergence and create a new industry structure.



Think 2032! – Future Industry Structure

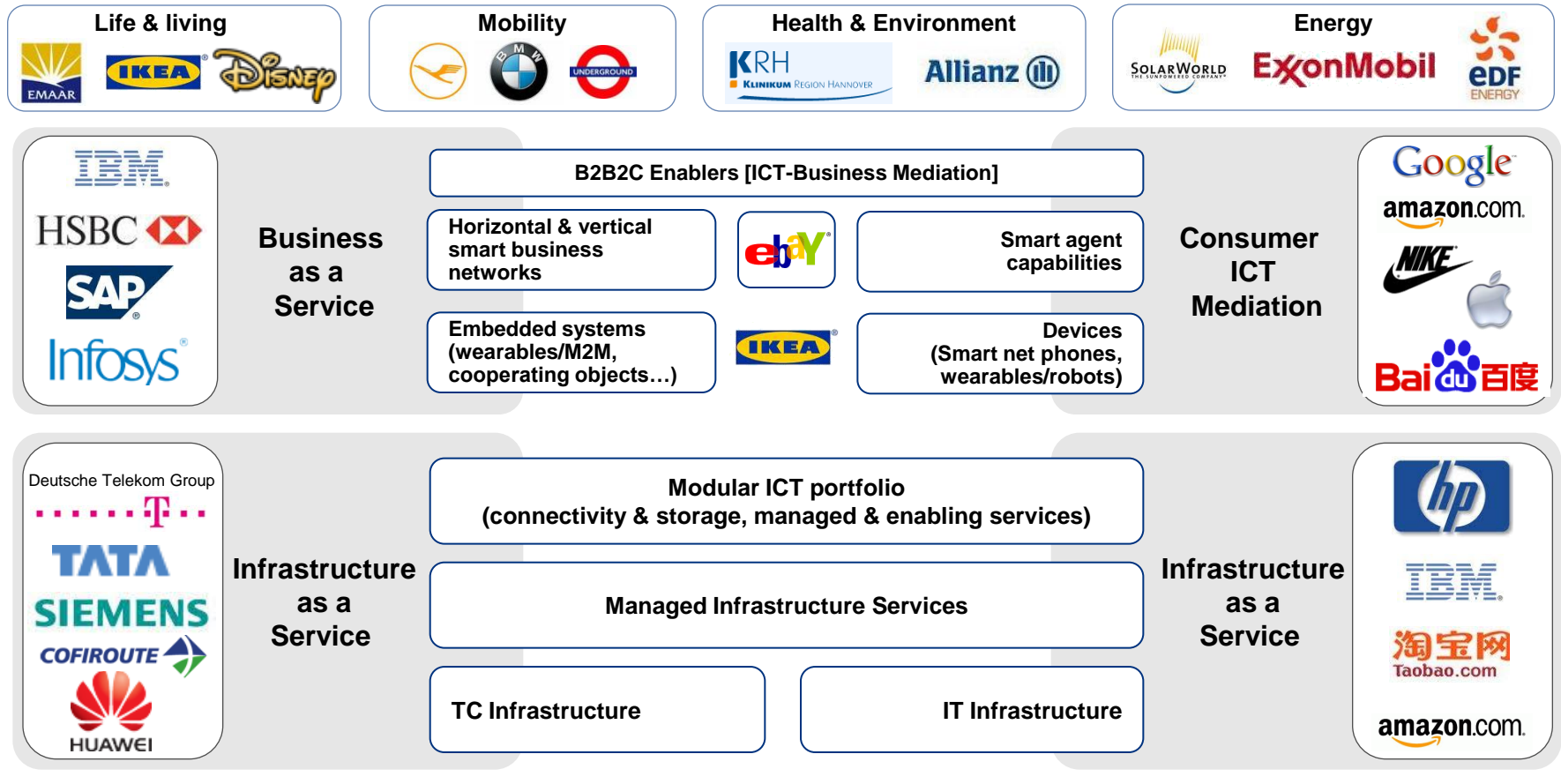
New revenue opportunities open up, whilst competitive boundaries blur.



Think 2032!

Each player has to position itself according to horizontal economies of scale depending on B2B2C maturity and vertical integration with respect to field experience.

Key ICT- industry convergence fields 2032



Content

5. Take Aways

Six Take Aways (1/2)

“Think ICT 2032” affects your decision making today... be smart!



1

BaaS, CIM and IaaS **require new and different core competencies.**

2

CIM companies will need to be **innovative and agile.**

3

Ad hoc **smart business networks** will represent a large portion of an automated and embedded economy.

Six Take Aways (2/2)

We believe it's time now to think about the necessary strategic and organizational transformation processes.



4

The **laaS business model** offers sustainable profits for few large **ICT companies**

5

Successful ICT players have the chance to **profit from the future Asian power house**

6

Each strategy must start with an **honest assessment of company DNA.**



Think 2032!

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