



Listening to the numbers: spend wiser before
spending more – but spend more

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IDC: Getting Data to Reveal IT's Secrets

Europe

Albania	Kyrgyzstan
Austria	Latvia
Azerbaijan	Lithuania
Belarus	Malta
Belgium	Moldova
Bosnia & Herz.	Montenegro
Bulgaria	Netherlands
Croatia	Norway
Cyprus	Poland
Czech Republic	Portugal
Belgium	Romania
Denmark	Russia
Estonia	Serbia
Finland	Slovakia
France	Slovenia
FYROM	Spain
Germany	Sweden
Georgia	Switzerland
Greece	Tajikistan
Hungary	Turkmenistan
Ireland	Ukraine
Italy	United Kingdom
Kazakhstan	Uzbekistan
	Rest of Europe



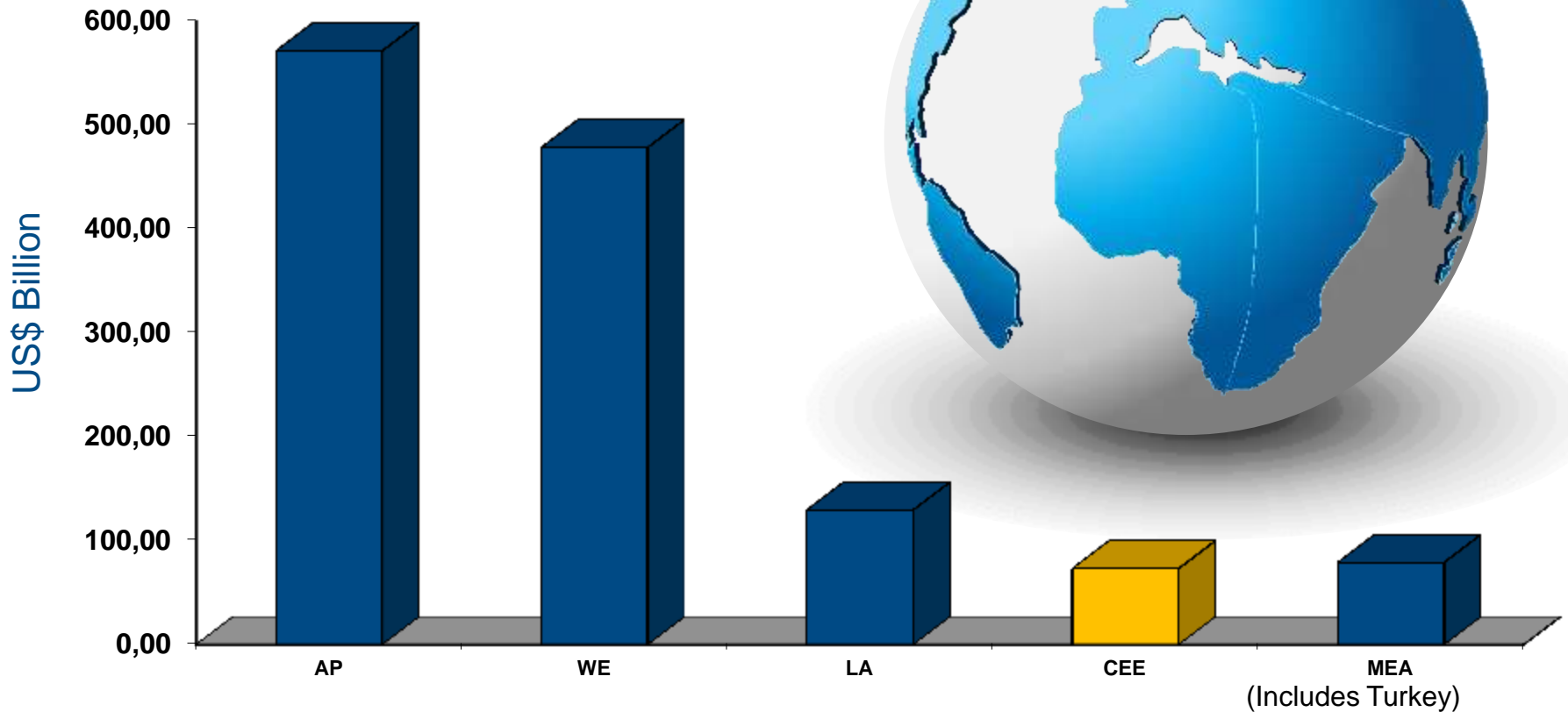
Middle East/Africa

Turkey	Egypt
UAE	Morocco
Saudi Arabia	Algeria
Kuwait	Tunisia
Qatar	Libya
Oman	Ghana
Bahrain	Kenya
Lebanon	Uganda
Syria	Nigeria
Iran	Namibia
Jordan	Ivory Coast
Israel	Ethiopia
Rest of ME	Tanzania
	Botswana
	South Africa
	Rest of Africa

- Offices in more than 30 Countries
- Research coverage of 75 countries
- 130+ analysts making it happen

Intro: context from the top down

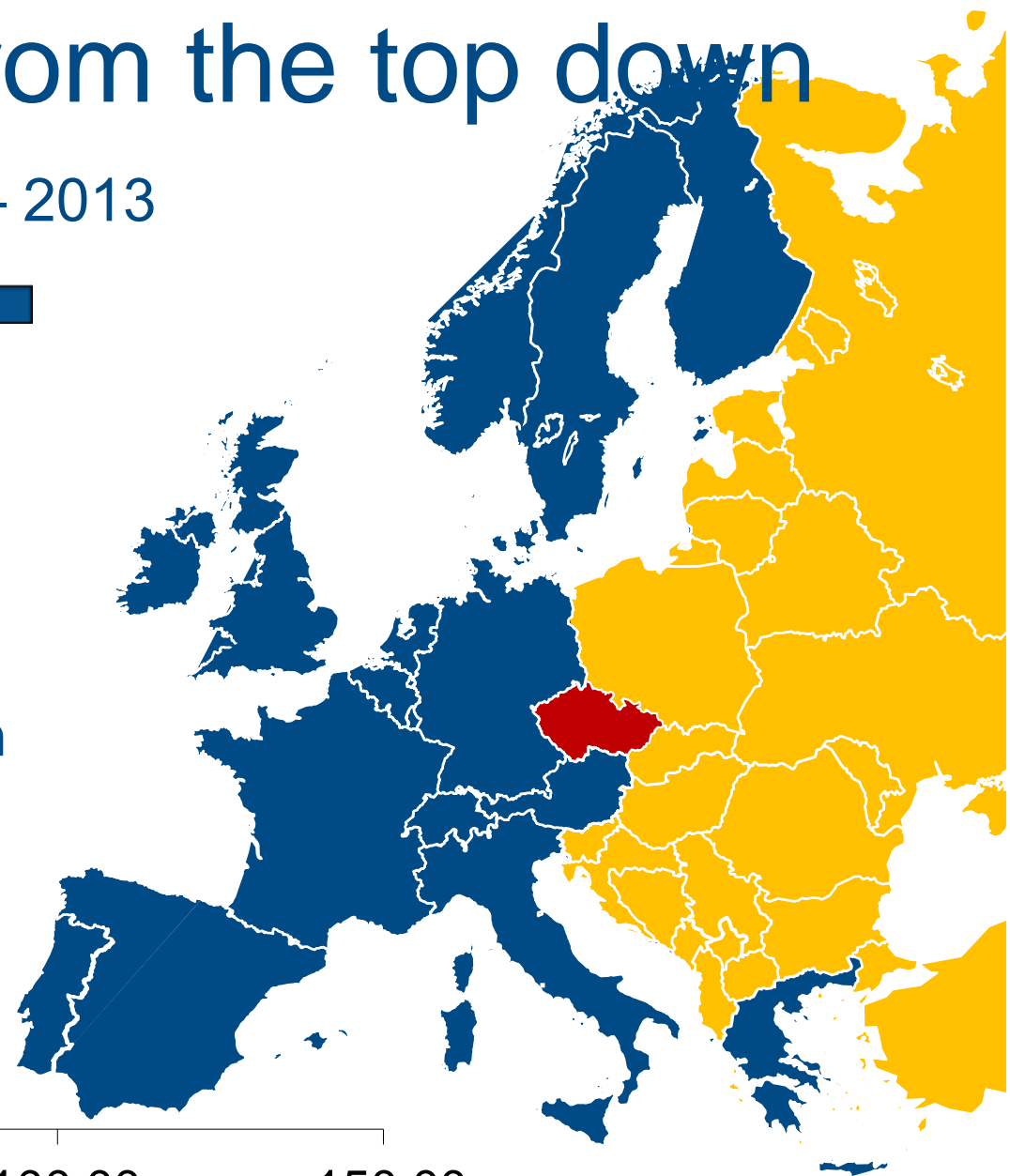
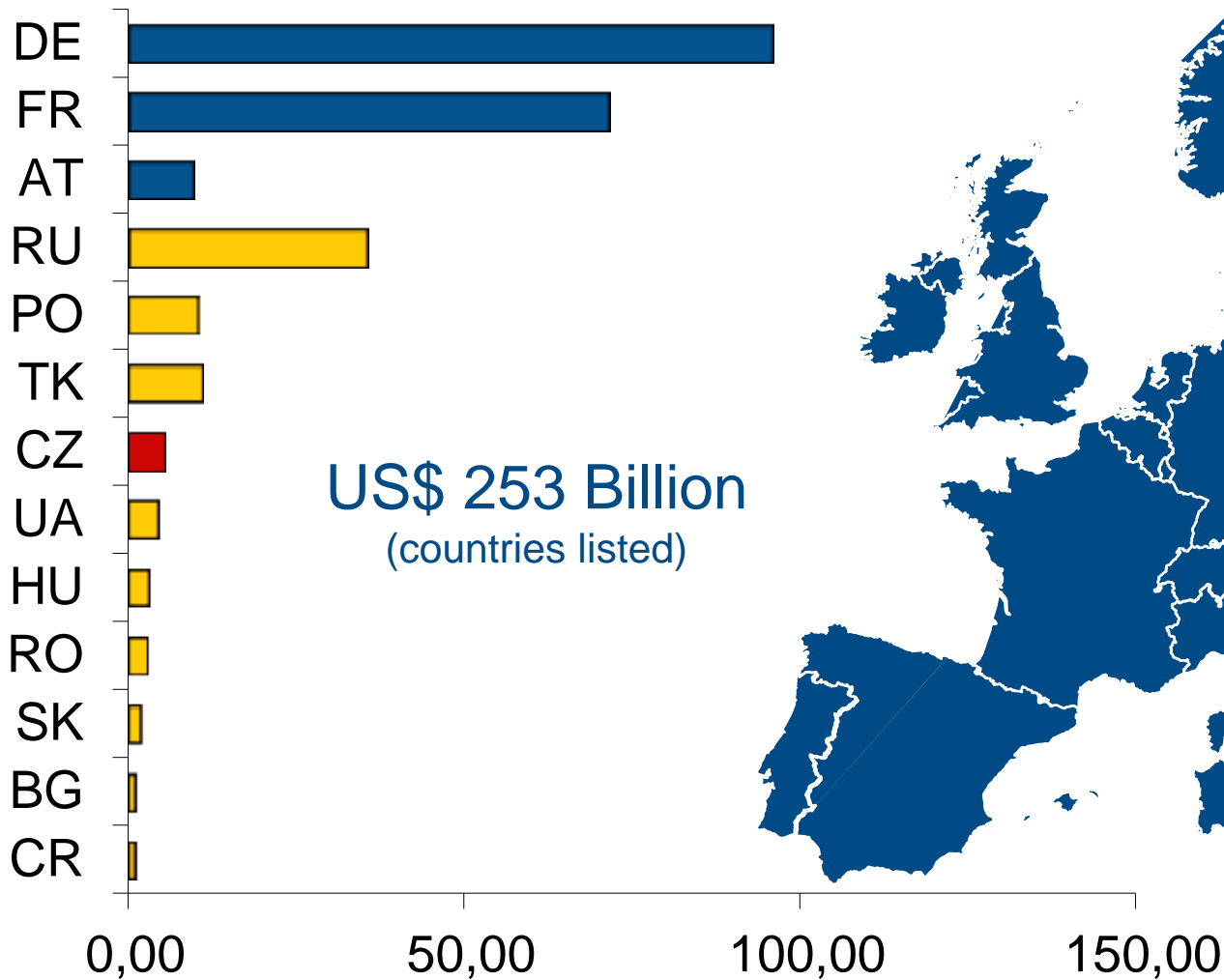
Regional IT Spending – 2013



Global IT spending: USD 2 043 billion

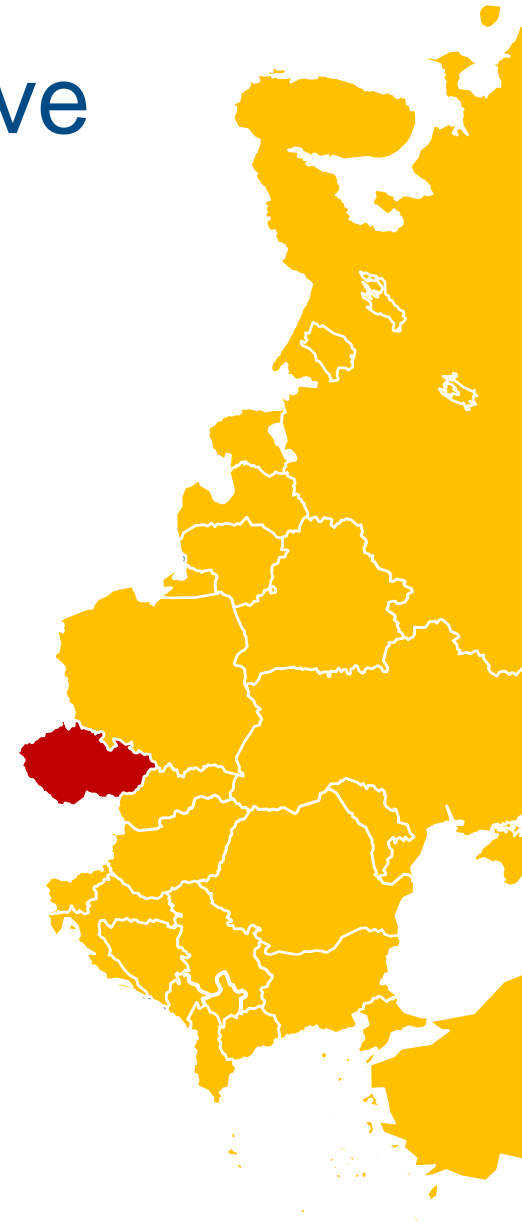
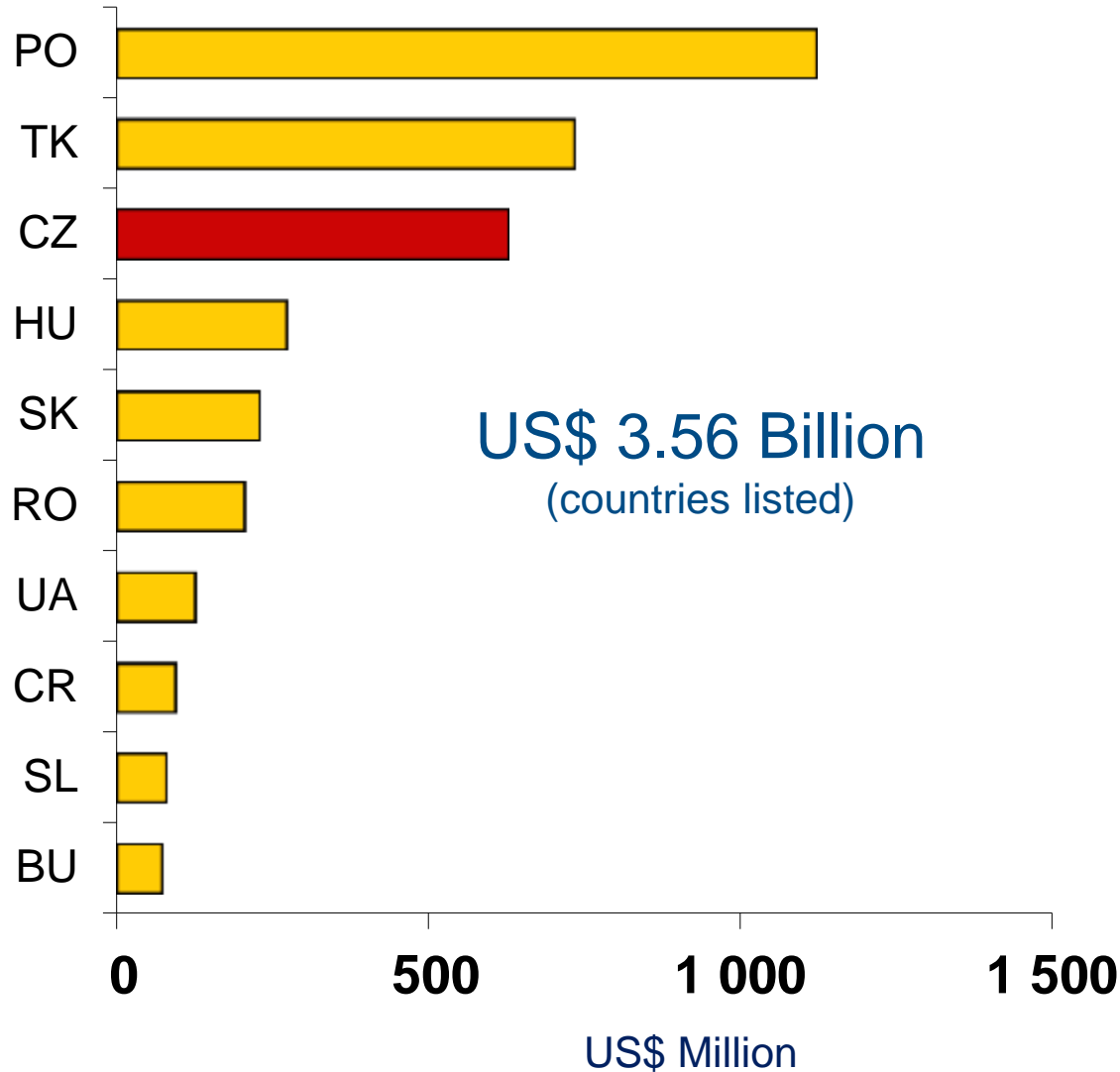
Intro: context from the top down

Regional IT Spending – 2013



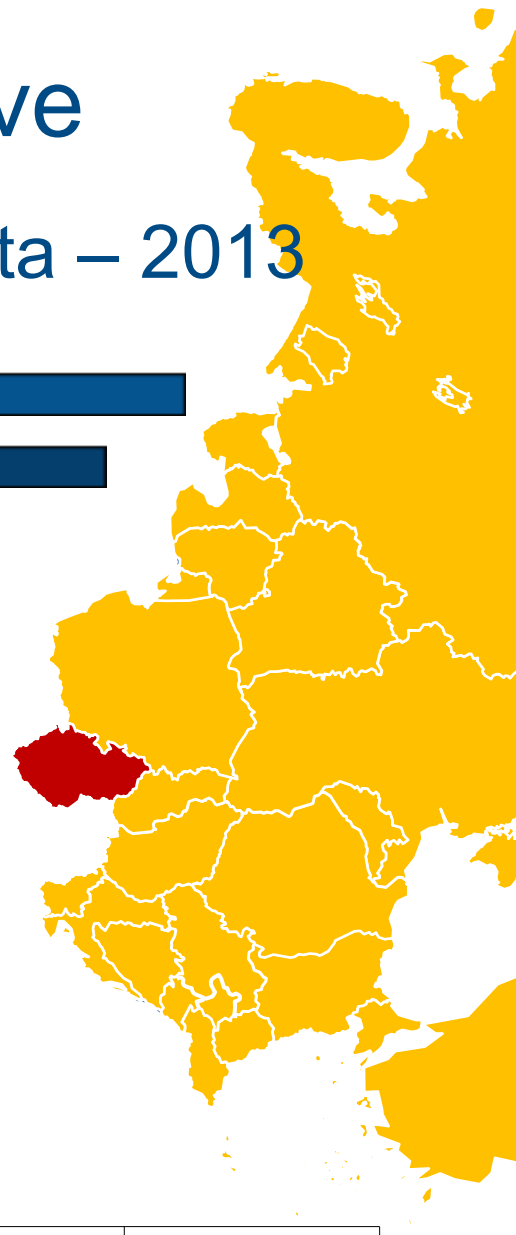
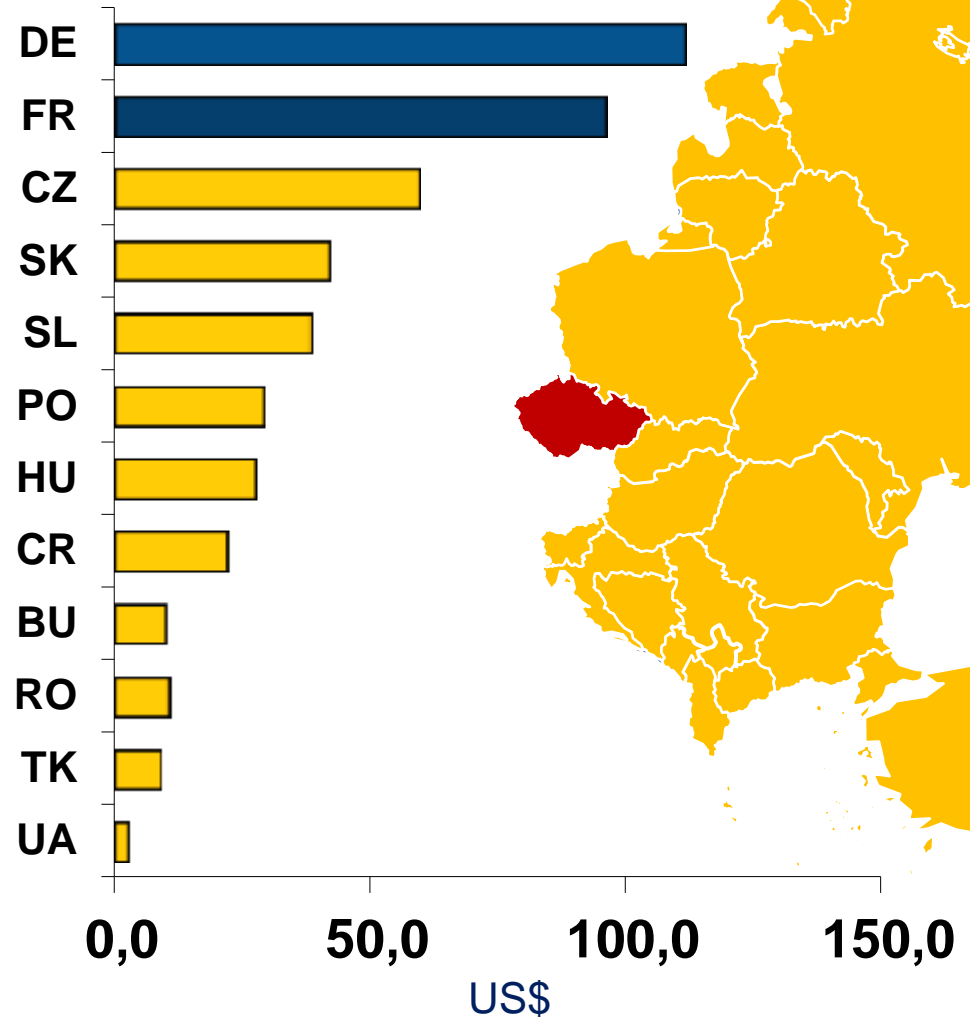
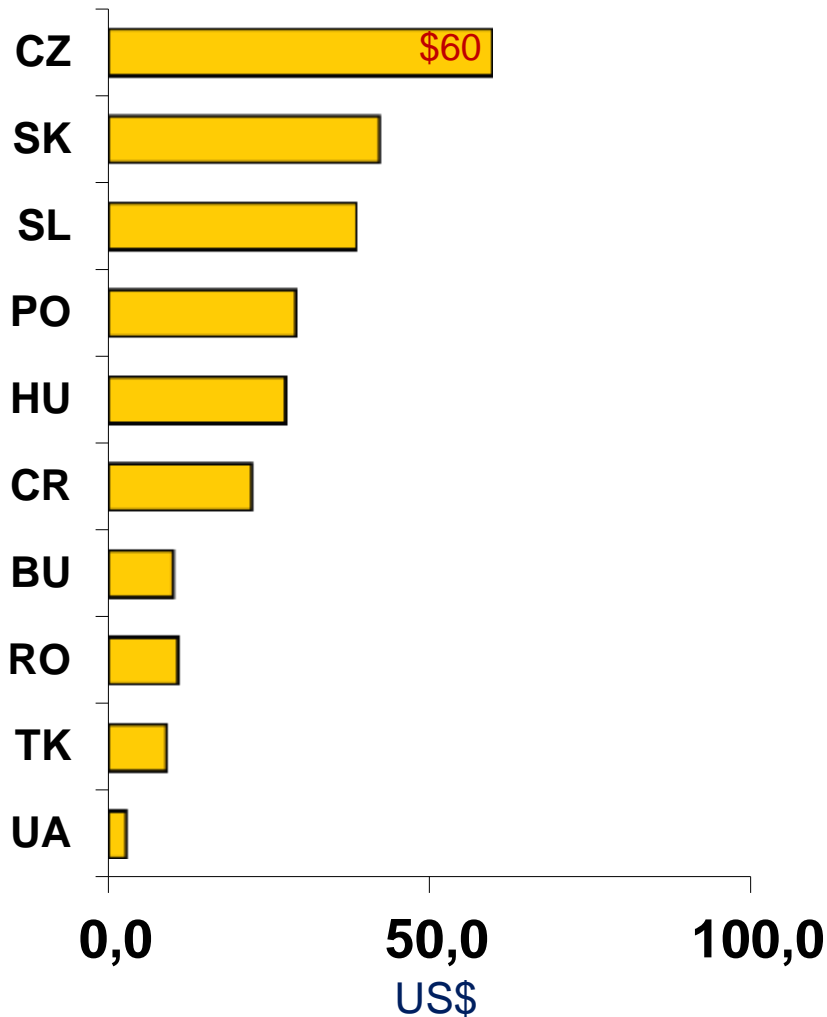
Government: regional perspective

Government IT Spending – 2013

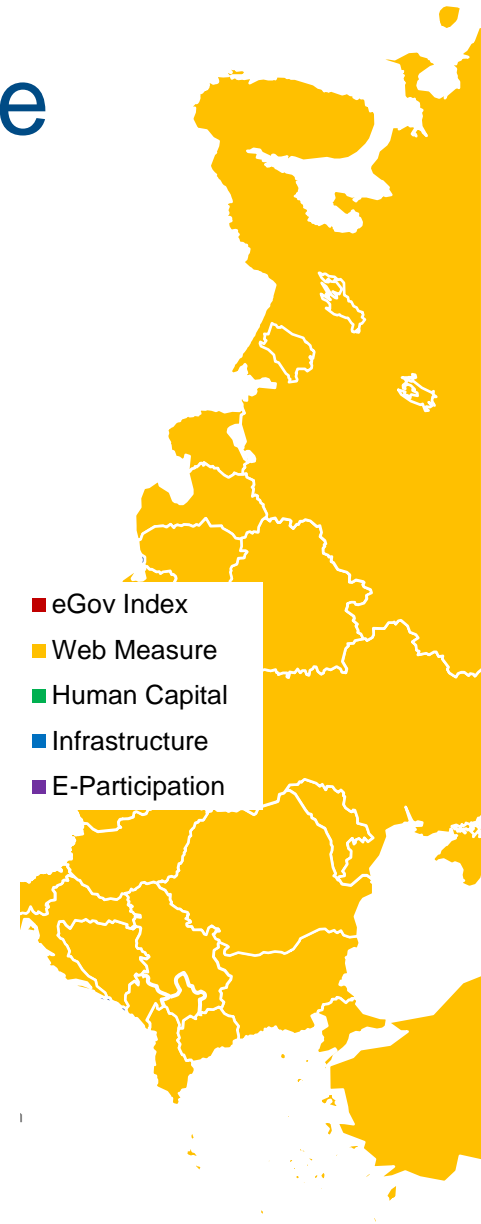
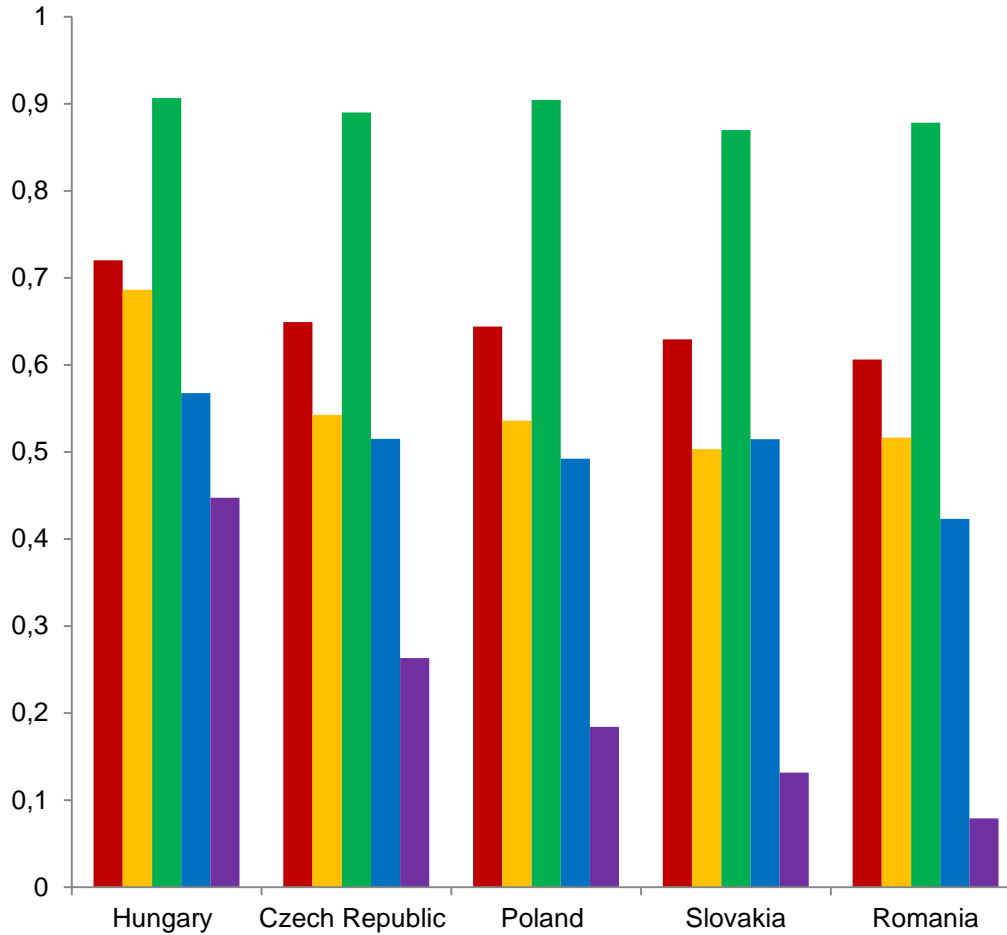


Government: regional perspective

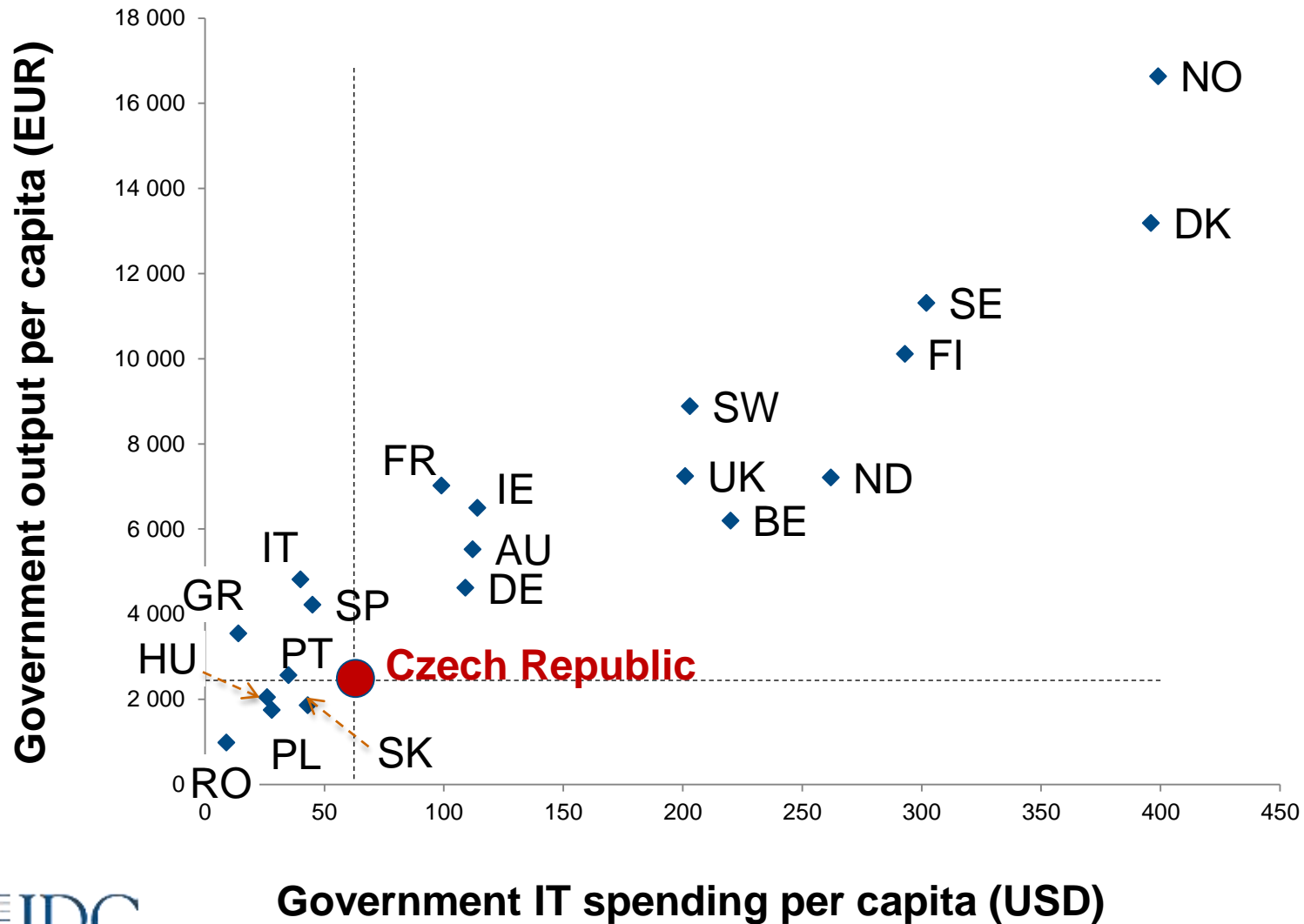
CEE government IT spending per capita – 2013



Government: regional perspective



Government: regional perspective



What's the connection?

Government IT spending per capita:

Correlation with UN eGovernment Index:

Correlation with government output:

Why does it matter?

Government serves the citizen

- the citizens expect it

Governments set the standards

- for citizen attitudes, for business

Governments compete

- for students, for immigrants, for FDI, for business, for entrepreneurs, for its own people

Needed: more champions

New government – new opportunity to make the change

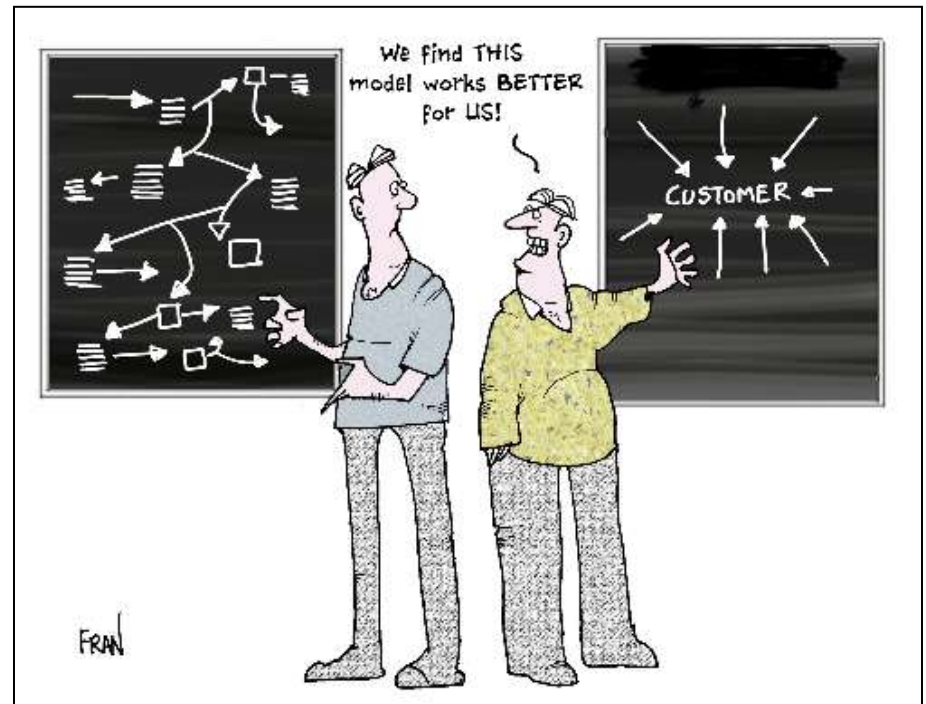
1. Shared services (or at least shared tools)
Set aside silo differences – best practices/benchmarking – SLAs

2. “The new normal” – change
Current use and need – standardization not institutionalization

3. Transparency: to ensure return
Where the money has been going – where it will go

4. Clear direction
Top level – mid level – in practice

Citizen comes first – lets make them proud



Appoint a citizen experience leadership team.
Do the hard work to have all staff be customer-focused.

Thank you

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