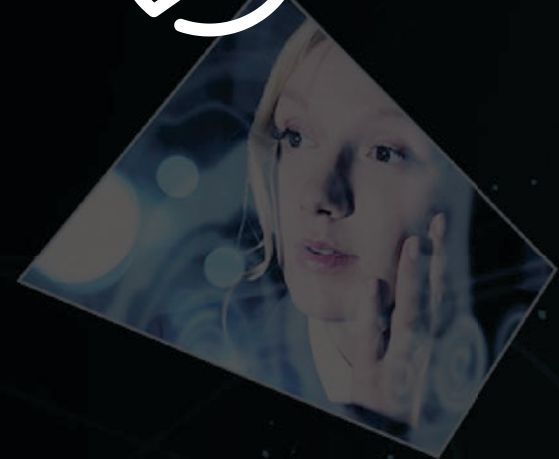


IDC FutureScape 2021



**Creating a Sustainable Digital Economy in
2021 and Beyond**



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2021: Welcome to the Sustainable Digital Economy

In 2020, COVID-19 dramatically changed the business environment, forcing us to face new challenges and new ways of operating under what is described as a volatile, uncertain, complex and ambiguous (VUCA) economy. Despite the unfolding challenges, **technology has allowed us to achieve things we never thought were possible.**

European organizations have gone through or are still progressing along the five-stage journey from crisis to recovery. To navigate the journey to the Future Enterprise, organizations have to set their strategy along three critical stages: respond to the current crisis, be digitally resilient to be prepared for whatever shock is on the horizon, and reignite to be sustainable, innovative, and future proof.

IDC's vision of the Future Enterprise is an organization that is completely digitally transformed. Such an organization underpins business processes with technology, is fueled by innovation, and is platform-enabled and ecosystem-centric.

From Crisis to the Future Enterprise: The 3 Rs

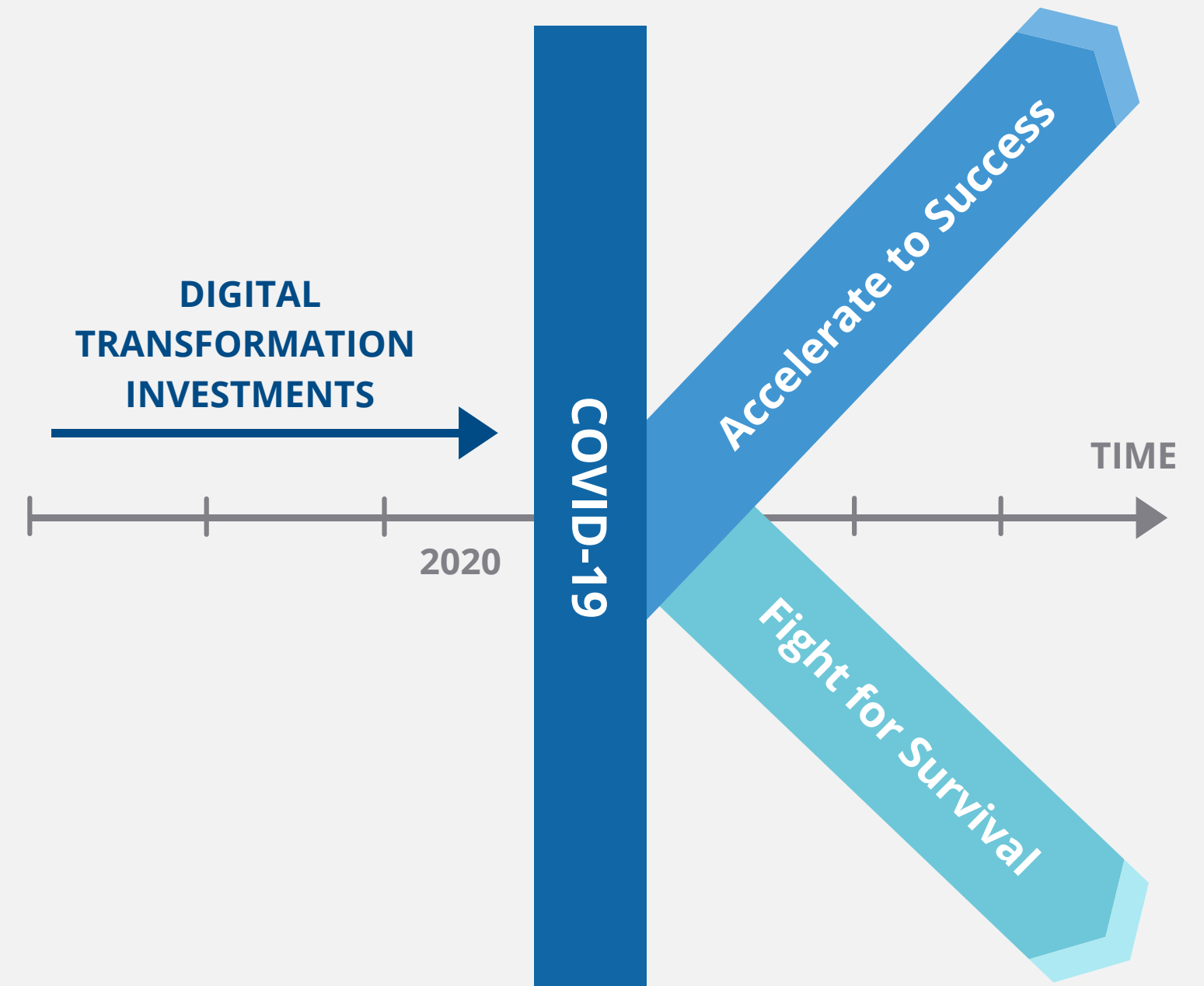


So 2021 Will be a Race to Outcomes from Digital Investments

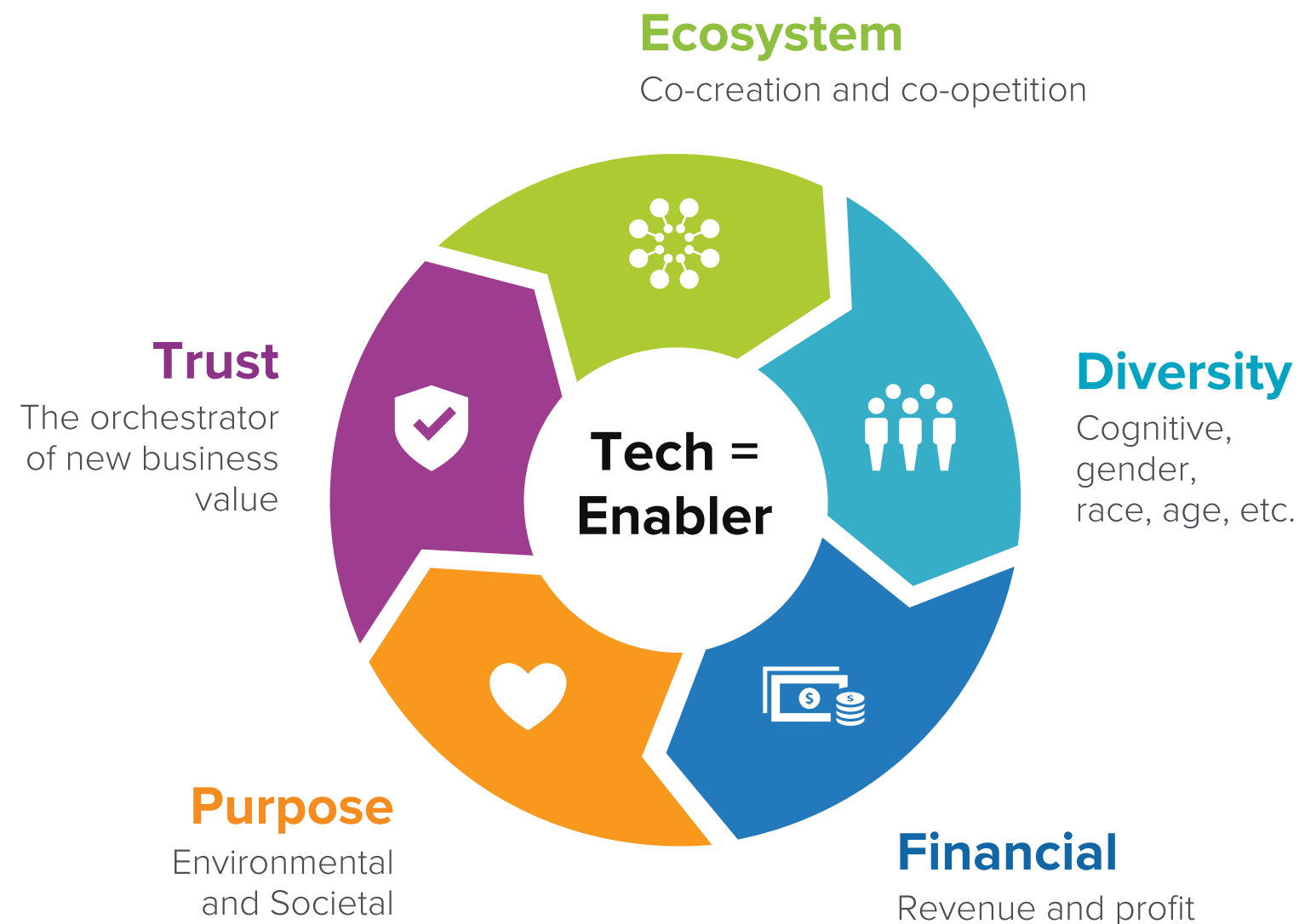
Every company will have its own road to recovery. However, irrespective of where companies are along the road, when considering their digital transformation investments plan, they will be in front of a K. We refer to this as the **K-Shaped recovery** — where each company will be at a crossroads, either accelerating to success or fighting for survival.

The key to being on the upslope of the curve is linked to digital investment and particularly the extent to which **digital investment can deliver outcomes**.

2020: When Transformation Hits the "K"



The Race to "New" Business Value



The race to digital outcomes will go beyond financial and top-line growth. It will encompass a totally new set of values for the Future Enterprise.

In 2019, we talked about business value being redefined to go **beyond financials and include ecosystem and purpose value** — including the initial "green shoots" of environmental and societal value entering the equation. Now, enterprises are broadening their definitions of value even further.

On top of financials, ecosystem, and purpose values, CEOs have to deliver **trust and diversity**. There is increasing scrutiny as the public takes a closer look at the broader impact of the businesses they engage with.

Companies need to demonstrate that they can be trusted in a holistic way that includes brand image, sustainability, diversity, and ecosystem reputation. As organizations won't be uniquely measured on the bottom line, a new style of leadership — more human and empathic — is needed.

Baseline Prediction: The Accelerated Digital Destiny

The digital transformation of many organizations has accelerated, triggered by different needs, including the need to close digital gaps, support new requirements, or capture market share. As a result, the economy will further ramp up its digital destiny.

This is why spending on digital initiatives will continue to grow at a double-digit rate in Europe, outpacing the expected GDP growth by a factor of 3. Organizations turning those digital investments into outcomes will ramp up quickly onto the upslope of the K-shaped recovery.

Welcome to the world we envisaged for 2023 — now. Welcome to the digital era, when technology is critical to respond, adapt, and capture new opportunities.



Giulia Carosella

European Digital Transformation
Practice Lead



Erica Spinoni

Research Analyst, European
Digital Transformation Practice

"In 2021, growth in digital investments in Europe will outstrip GDP growth by a factor of 3."

An Example of this Rapid Acceleration: Volkswagen Group

Despite revenue declines of **17%** for the first 9 months of 2020, **Herbert Diess** announced in November that the company would be doubling digital investments to **€27B over the next five years**. This is an example of how CEOs are stepping on the gas to accelerate the digitalization of products, services, and business models to future proof the business.

To internalize future shocks, CEOs have to build upon the lessons learnt in 2020:

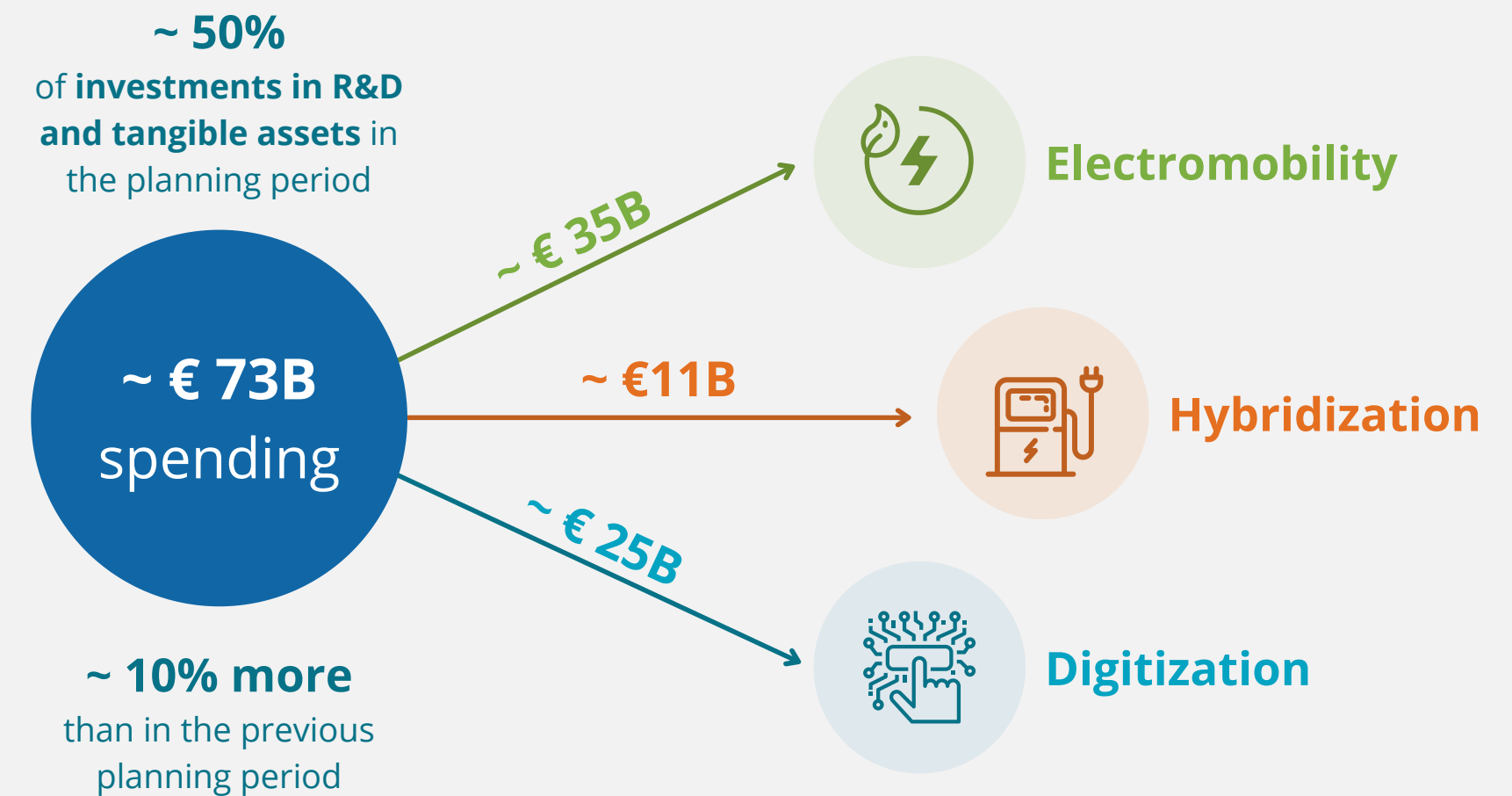
1. **Never waste a crisis.** Develop a learning mindset in which a different leadership model will be required for the better normal.
2. **Treat 2021 as a race to sustainable business outcomes.** Accelerate the journey to the digital destiny, understanding that the outcomes go beyond financials and the need to encompass new business values.
3. **Empower technology leadership.** Give a seat at the board to technology leaders as technology plays a pivotal role in every business area.

Volkswagen Ramps Up Investments in Tech Transformation

Volkswagen **doubles** its digital transformation spend to **\$27B** through to 2025, as part of its Future Technologies investment plan:



Herbert Diess
CEO, Volkswagen Group

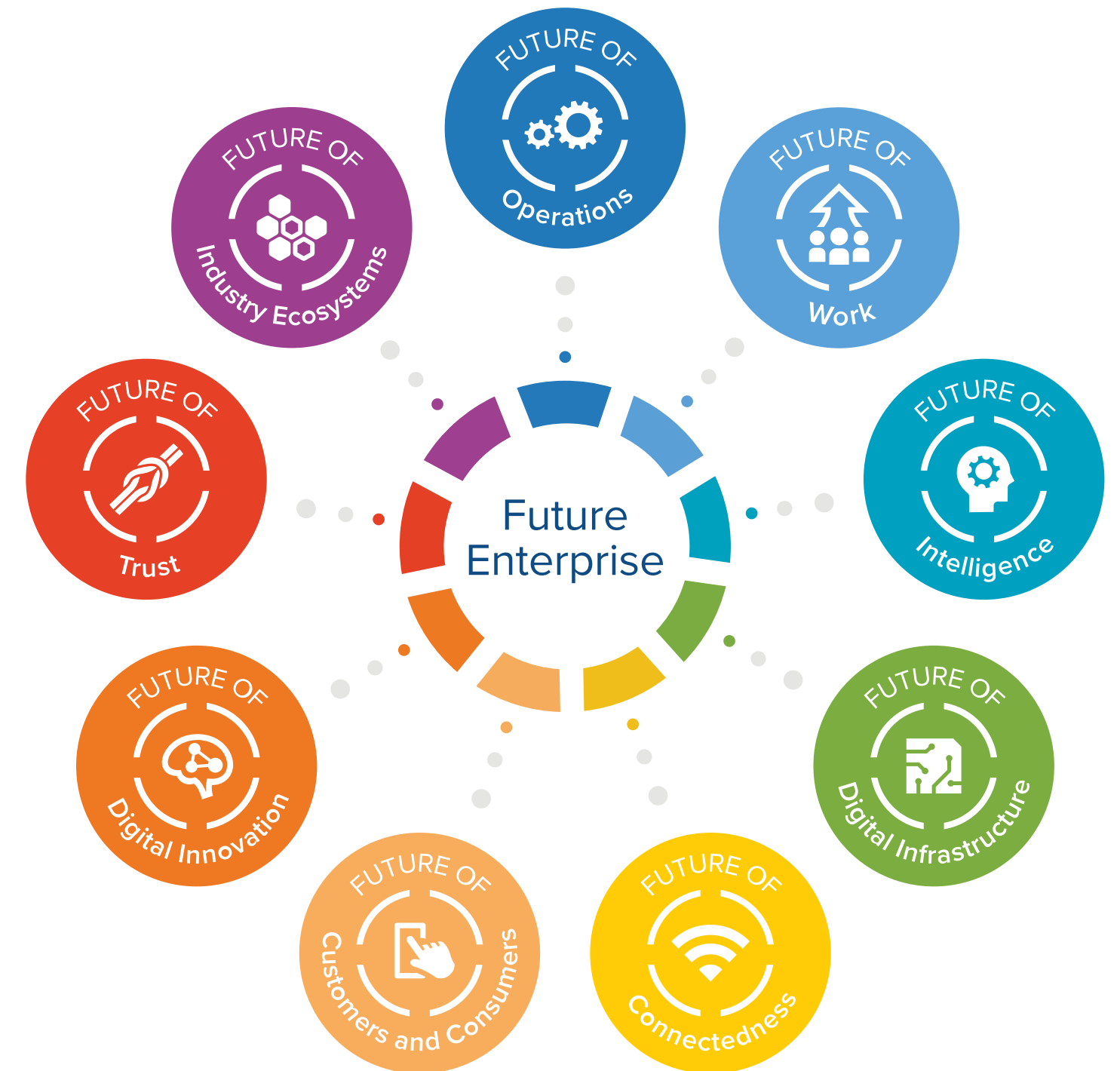


Source: Volkswagen Group

IDC Predictions: Next Actions to Become a Future Enterprise

IDC's predictions are created to embrace both the 3Rs to the future enterprise and the redefinition of business values to provide clear best next actions to become a future enterprise.

IDC's predictions provide key action items for European organizations' agendas along nine "Future of X" items. Armed with these nine agenda items, European organizations can move forward towards a better normal, leveraging technology to become the Future Enterprise.



Key 2021 European Predictions

A Carbon Friendly Future

Future of Operations is the transformation of operations from an efficiency focus to being resilience-driven to support the increasing market demand for customization and experiences.

SHORT-TERM PREDICTION

In 2021, 90% of European COOs will incorporate cybersecurity investments into third-party risk management programs to build more resilience and trust across the supply chain.

On the road to recovery, the short-term Future of Operations prediction focuses on:

Response
● ● ● ● ●

Resilience
● ● ● ● ●

Reignition
● ● ● ● ●

The short-term Future of Operations prediction drives these business values:

Financial
Diversity

Ecosystem
Trust

Purpose

LONG-TERM PREDICTION

By 2023, 80% of European operations-intensive organizations will invest in IT-OT, supply chain integration, and performance management technologies, helping reduce region-wide carbon emissions by an additional 3%.

On the road to recovery, the long-term Future of Operations prediction focuses on:

Response
● ● ● ● ●

Resilience
● ● ● ● ●

Reignition
● ● ● ● ●

The long-term Future of Operations prediction drives these business values:

Financial
Diversity

Ecosystem
Trust

Purpose



FUTURE OF
Operations

3 IDC Takeaways

- European companies will increasingly use digital capabilities to improve the efficiency and resilience of their supply chains and deliver high-quality products and services despite any potential economic or environmental disruptions.
- Technology connecting OT and IT processes with supply chains and markets will play a major role in carbon emissions reduction, but also in supply chain visibility, process safety, and efficiency. More importantly, this will ultimately support Europe's sustainable future and industrial excellence.
- Up to 80% of organizations have suffered a data breach in the past 12 months due to cybersecurity weakness in their supply chain. For this reason, European companies will increasingly adopt and integrate new technologies with secure supply chain management software to create a more intelligent, risk-aware, and resilient "thinking" supply chain.



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Maersk Drilling Carbon Capture Project

With the fall in oil prices last year, Maersk Drilling saw a drop in demand for oil well drilling. It decided to join a consortium led by the Danish government, which is focusing on reusing discontinued offshore oil and gas fields for permanent CO2 storage. Maersk Drilling has entered an agreement to invest \$1 million in the California-based company Clean Energy Systems to help develop a new technology called Carbon-Negative Energy.

Technology Helping the Shift
**Towards Carbon-Neutral
Drilling** in the Resource Industry



MAERSK
DRILLING

Resilient Workforce: From HR to HX

Future of Work is a fundamental change to the concept of work that transforms worker behaviors and skills and organizational culture, supports a dynamic work environment not bounded by time of day or physical space, empowers teams and a diverse workforce, and fosters human-machine collaboration.

SHORT-TERM PREDICTION

In 2021, two-thirds of European companies will invest in human experience (HX) technologies, transforming their HR functions to attract and retain top talent.

On the road to recovery, the short-term Future of Work prediction focuses on:

Response



Resilience



Reignition



The short-term Future of Work prediction drives these business values:

Financial

Diversity

Ecosystem

Trust

Purpose

LONG-TERM PREDICTION

By 2023, 70% of European companies will use technology to enable equivalence in a borderless workplace.

On the road to recovery, the long-term Future of Work prediction focuses on:

Response



Resilience



Reignition



The long-term Future of Work prediction drives these business values:

Financial

Diversity

Ecosystem

Trust

Purpose



3 IDC Takeaways

- HX will guide HR evolution along the development of a resilient workforce, from talent recruitment and scouting to coaching, performance management, and employee rewards.
- Technologies such as analytics/AI and workflow management will allow companies to automate and augment multiple HR functions with new capabilities such as talent scouting, onboarding, training, and retention, and create a nourishing work culture in a hybrid working environment.
- Companies will use technology to reduce inequalities between those who can and cannot attend offices and increase diversity by removing physical and financial barriers to the employment of the disadvantaged. Removing physical barriers allows the recruitment of the best talent irrespective of location. It provides a better employee experience by providing more flexibility and improves financial outcomes by increasing company resilience.



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Associate Research
Director



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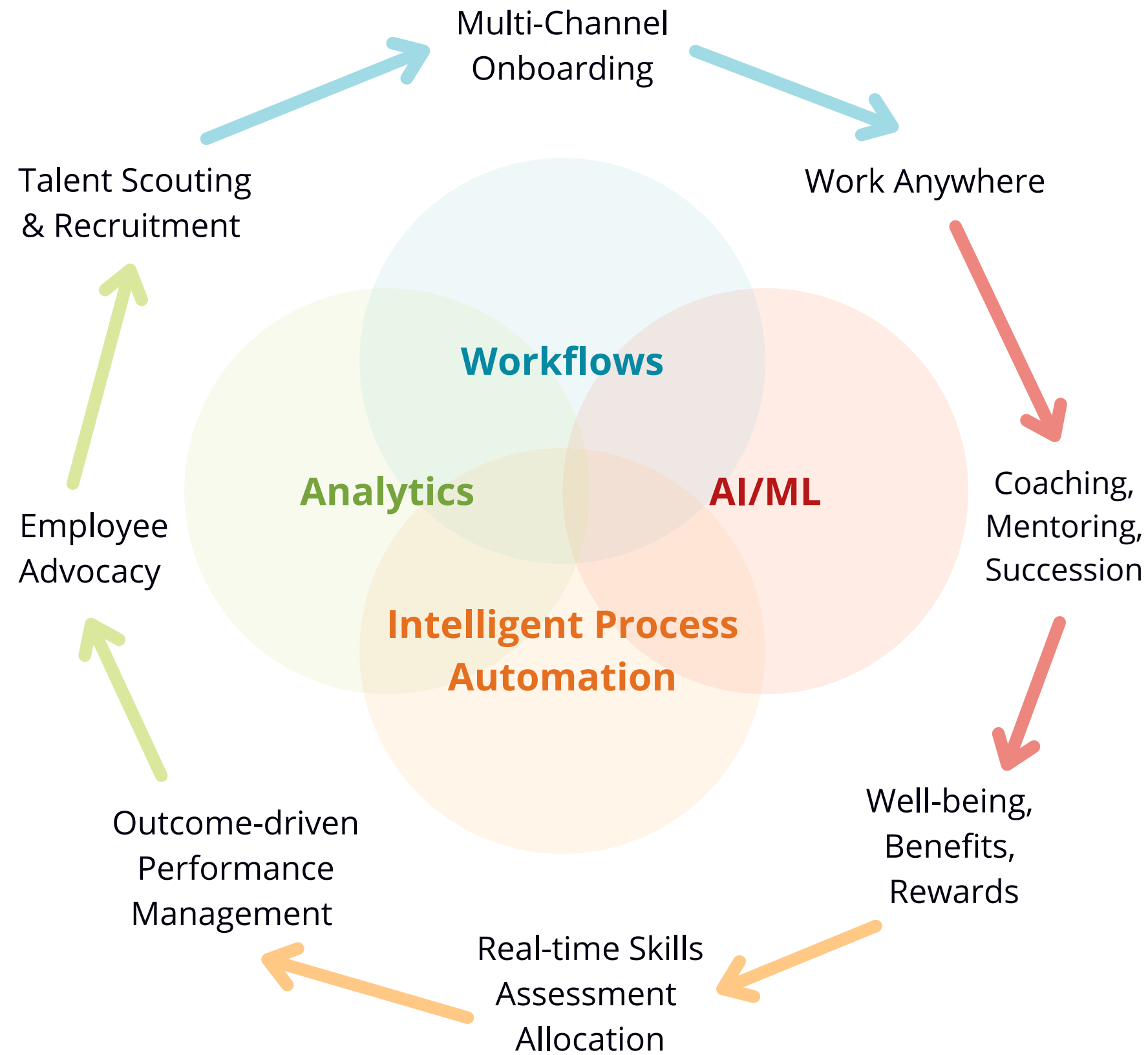


Alexandros Stratis
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Andrea Minonne
Senior Research Analyst

Winning the "New" Talent War: Game Changing Employee Experiences



Source: IDC Research, 2020



AI-Driven Resilient Operations for the VUCA Economy

Future of Intelligence is an organization's capacity to learn combined with its ability to synthesize the information it needs in order to learn and to apply the resulting insights at scale to gain a sustainable competitive advantage or an ability to fulfill the organizational mission.

SHORT-TERM PREDICTION

In 2021, 40% of European enterprises will combine AI and ML with automation at scale to drive resilience in delivering omni-channel customer experiences — improving customer advocacy and retention rates.

On the road to recovery, the short-term Future of Intelligence prediction focuses on:



The short-term Future of Intelligence prediction drives these business values:



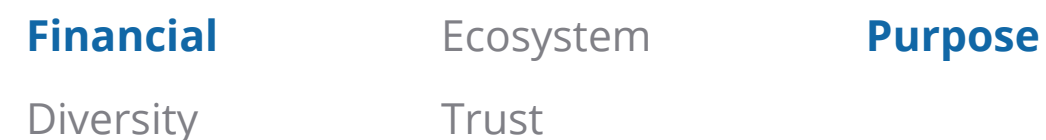
LONG-TERM PREDICTION

By 2023, given VUCA business environments, 20% of enterprises will invest in adaptive operations leveraging AI to improve resilience.

On the road to recovery, the long-term Future of Intelligence prediction focuses on:



The long-term Future of Intelligence prediction drives these business values:



FUTURE OF
Intelligence

3 IDC Takeaways

- Organizations across industries will increasingly invest in automation, powered by AI and ML, to scale customer-facing operations more dynamically and to make precious human labor and expertise as effective as it can be.
- In 2020, over 50% of European organizations relying on analytics models for decision-making struggled under the conditions posed by the VUCA economy. For this reason, organizations' response must be more than technology; it should also be based on an outside-in perspective, culture, and skills development.
- The U.K. construction trade retailer Travis Perkins reinvented its BI function in the cloud starting from grassroots engagement with business teams, through a series of hackathons. Travis Perkins' benefits spanned from a wide appreciation of tools to the development of skills and confidence among and within business teams.



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Philip Carnelley
Associate Vice President



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Adriana Allocato
Research Manager



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Senior Research Analyst

The AI-Driven Operations Control Center at Vodafone

Vodafone's chief executive wanted to know how much was being spent with one supplier.

How much is being spent with supplier X?

Do you want that for this week, last month, last quarter, last year, last three years....what do you want?

What will be the impact of extending payment terms from 30 days to 60 days?

We can also look at that for 15 days if you need...

This year has highlighted the value of greater transparency down the supply chain and having the flexibility to respond to changing circumstances: Don't have a digital-first strategy, have a digital-only strategy.



Nick Read
CEO of Vodafone



Ninian Wilson
Global Supply Chain Director &
CEO, Vodafone Procurement

Private 5G Networks to Win the Millisecond Latency War

Future of Connectedness enables organizations and individuals to connect seamlessly, regardless of their location, situation, or context.

SHORT-TERM PREDICTION

In 2021, 1 in 5 European manufacturers and logistics operators will begin private 5G network deployments to better connect operations.

On the road to recovery, the short-term Future of Connectedness prediction focuses on:



The short-term Future of Connectedness prediction drives these business values:



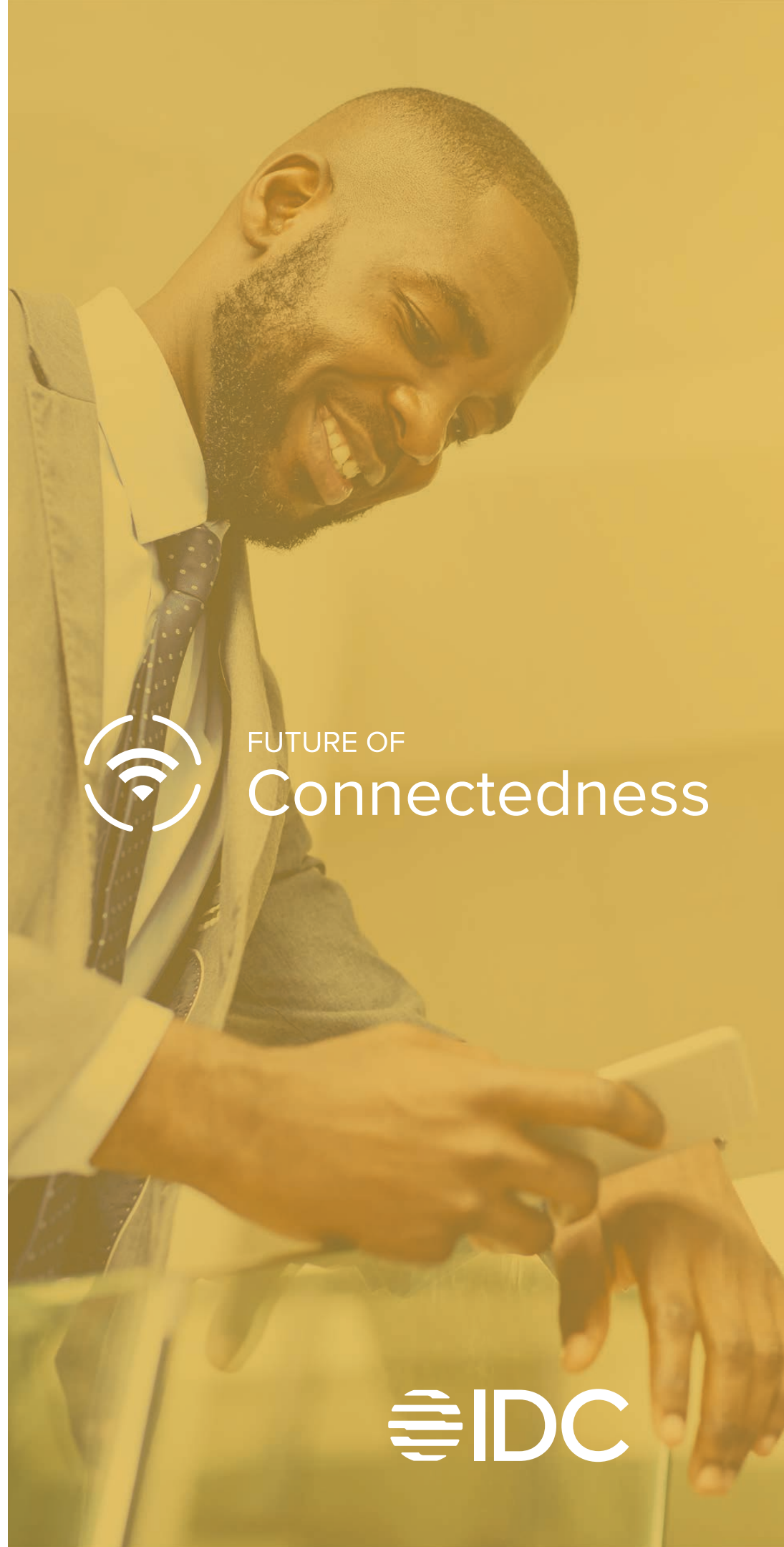
LONG-TERM PREDICTION

By 2023, only 15% of European enterprises will deliver new revenue streams from 5G investments.

On the road to recovery, the long-term Future of Connectedness prediction focuses on:



The long-term Future of Connectedness prediction drives these business values:



FUTURE OF
Connectedness

3 IDC Takeaways

- Enterprises across Europe will turn to private mobile networks to reduce costs, boost productivity, and improve security as well as availability by replacing outdated and inefficient network equipment.
- A variety of organizations will turn to private 5G networks to fulfil multiple goals. Hospitals will enable remote triage in connected ambulances, energy companies will mitigate employee risk by surveying remote facilities in hazardous environments with the help of mobile robots, and manufacturers will reduce downtime by improving network availability. For example, Worcester Bosch has already found that private 5G has enabled productivity improvement by 2% for some applications, double what was first expected.
- The benefits of 5G depend on the value that enterprises can inject in evolving business value creation chains, as well as participation in relevant 5G industry ecosystems — comprising technology innovation partners, cloud platform providers (ex hyperscalers), and telcos.



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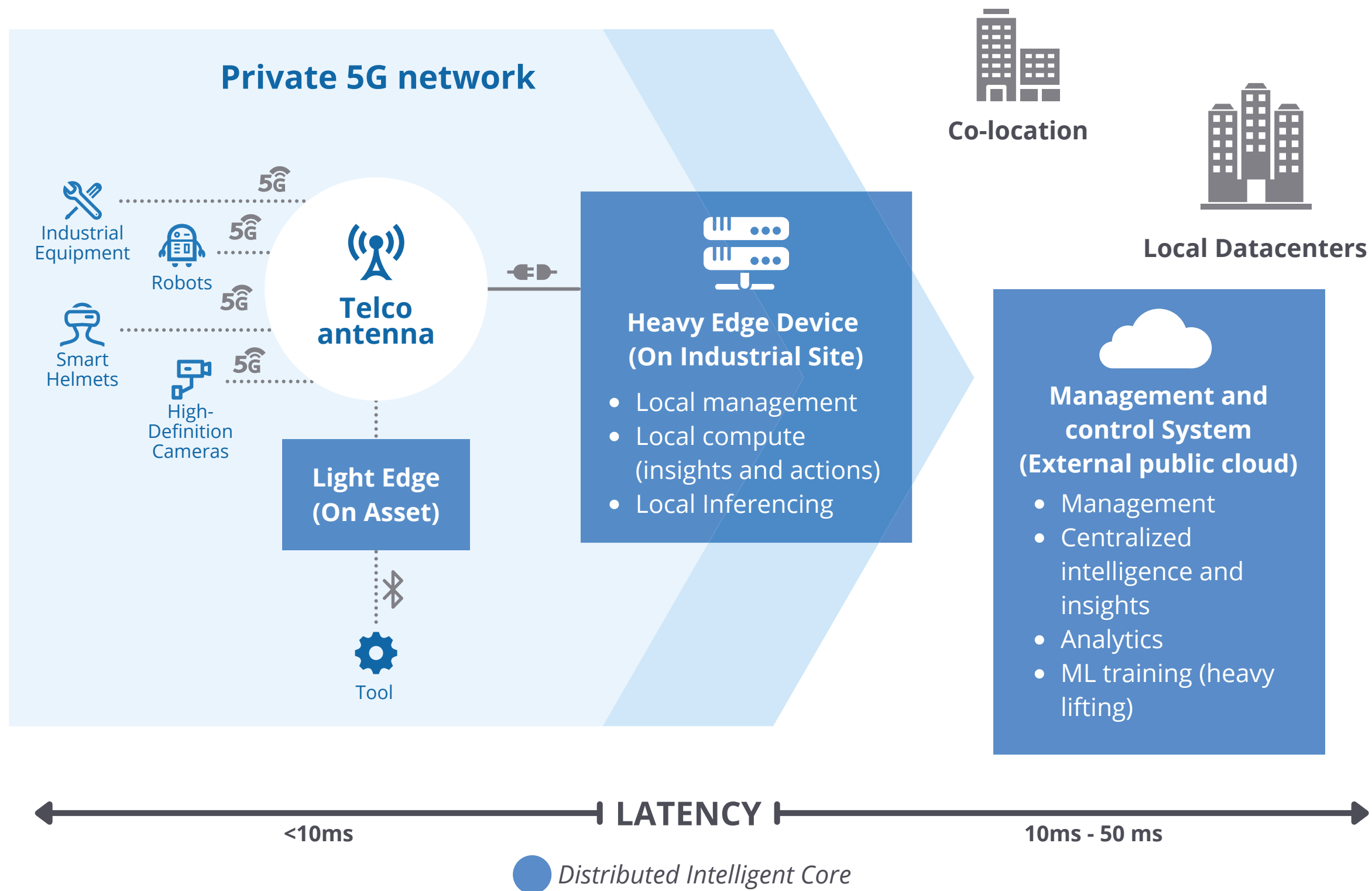


Rosalind Craven
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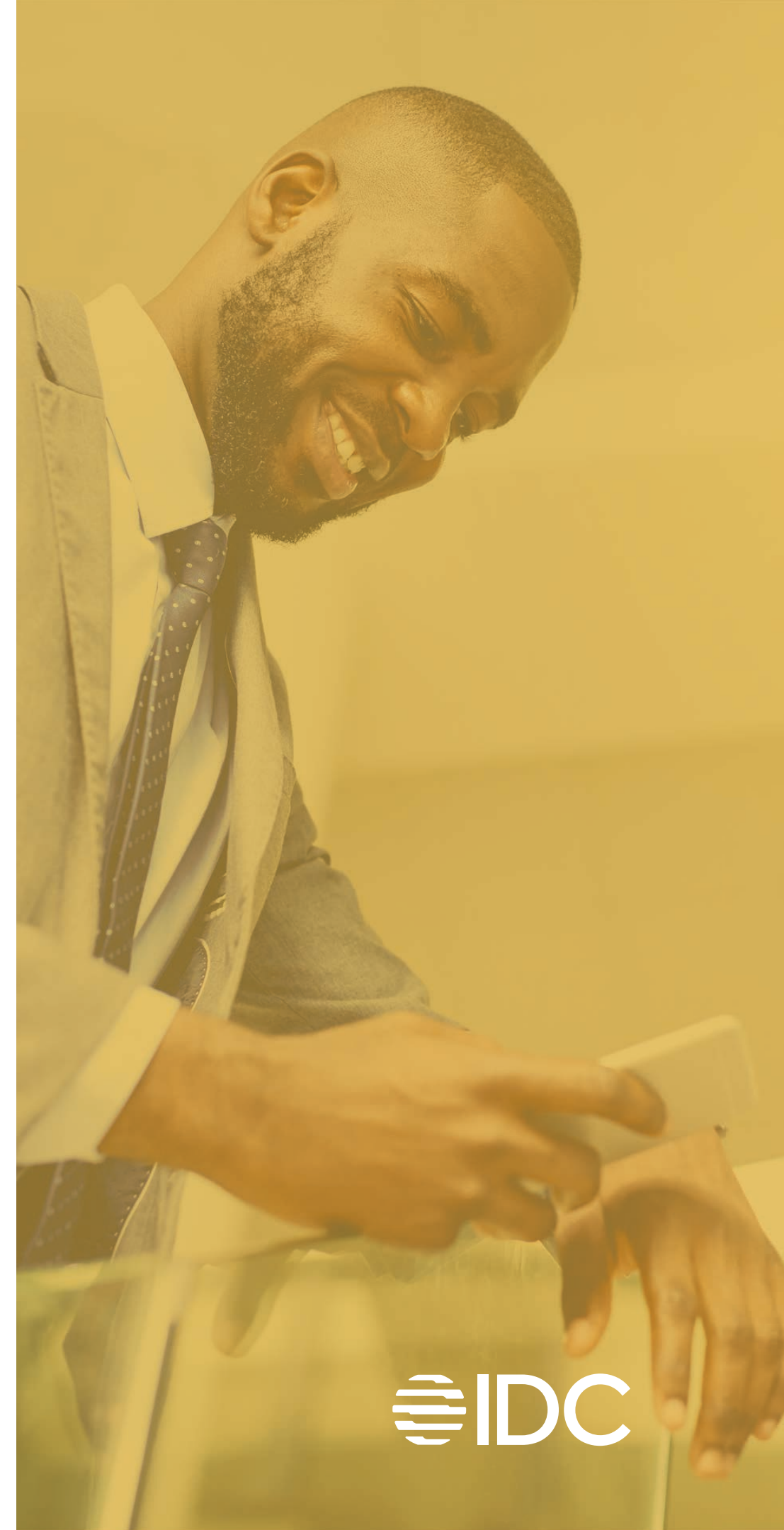


James Eibisch
Research Director

5G is also the Trigger for a New Form of Infrastructure: The Hybrid Edge



Source: IDC Research, 2020



The Hybrid Edge: The New Distributed Infrastructure

Future of Digital Infrastructure will underpin the delivery of agile, flexible, and reliable IT services in a seamless cloud-like manner, from on-premises through to public cloud services.

SHORT-TERM PREDICTION

In 2021, close to 20% of European on-premises enterprise infrastructure deployments will be financed by consumption-based models or leasing, representing \$2.6 billion in investment.

On the road to recovery, the short-term Future of Digital Infrastructure prediction focuses on:

Response
●●●●●

Resilience
●●●●●

Reignition
●●●●●

The short-term Future of Digital Infrastructure prediction drives these business values:

Financial
Diversity

Ecosystem
Trust

Purpose

LONG-TERM PREDICTION

By 2023, European hybrid edge infrastructure spending will almost double to nearly \$14B to support zero-latency use-cases.

On the road to recovery, the long-term Future of Digital Infrastructure prediction focuses on:

Response
●●●●●

Resilience
●●●●●

Reignition
●●●●●

The long-term Future of Digital Infrastructure prediction drives these business values:

Financial
Diversity

Ecosystem
Trust

Purpose



FUTURE OF
Digital Infrastructure

3 IDC Takeaways

- The shift towards OPEX consumption models will accelerate, helping companies in their strategic infrastructure transformations and tackling workloads that require extreme agility and flexibility, while lightening their balance sheet.
- A brand-new set of latency-sensitive use cases from zero-touch factories in manufacturing to smart mobility ecosystems, is leading to a "millisecond war" with the need for real-time decision making on a mix of structured and unstructured data.
- Buyers will need to place the right workloads in the right hybrid edge environment across core, heavy, light, and telco edge to drive competitive advantage. This will lead to higher requirements in terms of infrastructure management, handling, and orchestration.



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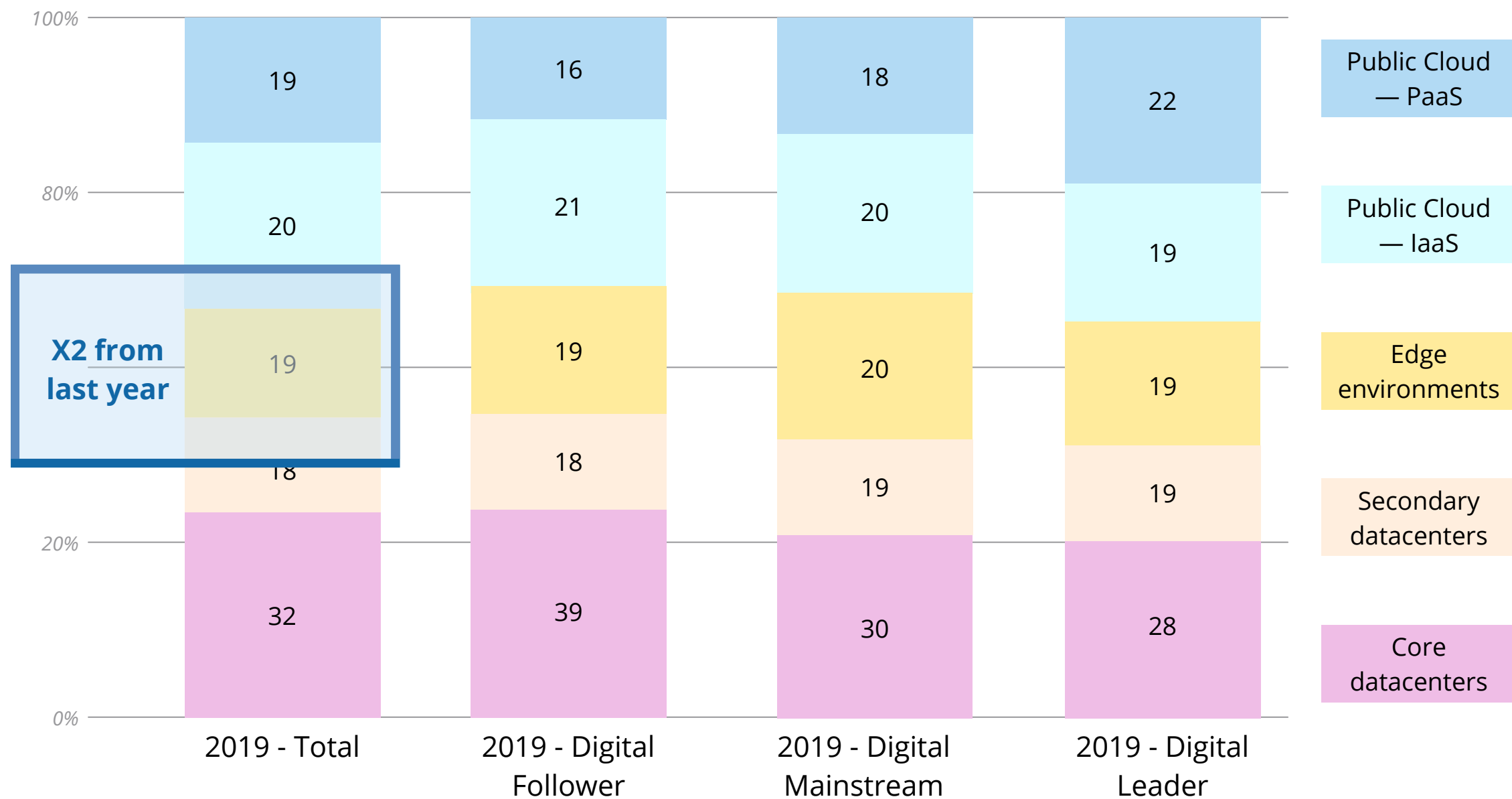


Gabriele Roberti
Research Manager



Eckhardt Fischer
Senior Research Analyst

Approximately how much of your total infrastructure spending was split between the following environments in 2019?



Note: Numbers refer to shares and they sum up to 100%

Resilient CX = Top Line "Defense"

Future of Customers and Consumers is an empathic relationship between customers and brands built on what the customer wants and how they want to be treated through the technology lens of awareness, engagement, learning, and measurement.

SHORT-TERM PREDICTION

In 2021, European enterprises will invest in enhanced customer services and digital engagement technologies at nearly three times the growth rate of the overall software market to drive customer loyalty and revenue growth.

On the road to recovery, the short-term Future of Customers and Consumers prediction focuses on:



The short-term Future of Customers and Consumers prediction drives these business values:



LONG-TERM PREDICTION

By 2023, 2 in 5 large B2C enterprises in Europe will invest in technology that intensifies emotional engagement and drives long-term customer loyalty.

On the road to recovery, the long-term Future of Customers and Consumers prediction focuses on:



The long-term Future of Customers and Consumers prediction drives these business values:



FUTURE OF Customers and Consumers

3 IDC Takeaways

- Being resilient in terms of customer and consumer relationships will be critical to build the top line defense on two levels:
 1. Protect revenue by providing game-changing customer support.
 2. Identify critical pockets of revenue growth as and when they emerge.
- The commerce landscape is rapidly moving from ecommerce to a Q-commerce framework (where the Q stands for Quick), where speed matters more than discounts and <1hour delivery will be the mantra. To get there, European enterprises will first have to fill commerce-related digital gaps, investing in customer service technologies such as optimized chatbots, automated responses, and self-service portals. At the same time, enterprises must attract new customers via digital channels, such as websites, apps, email, and social media – all woven together with software powering seamless and frictionless commerce.
- Experience is another key growth accelerator. B2C players must ramp up experiences and emotional engagements to stay competitive. One approach is to inspire deep interactions, like La Redoute, a fashion and linens retailer, did with its hashtag challenge, in which tens of thousands of customers sent in more than 110 thousand homemade videos. Another is to use "empathy advisors" that detect emotions in real time, like contact center agents at Zurich use to help them change how they interact with customers during a call.



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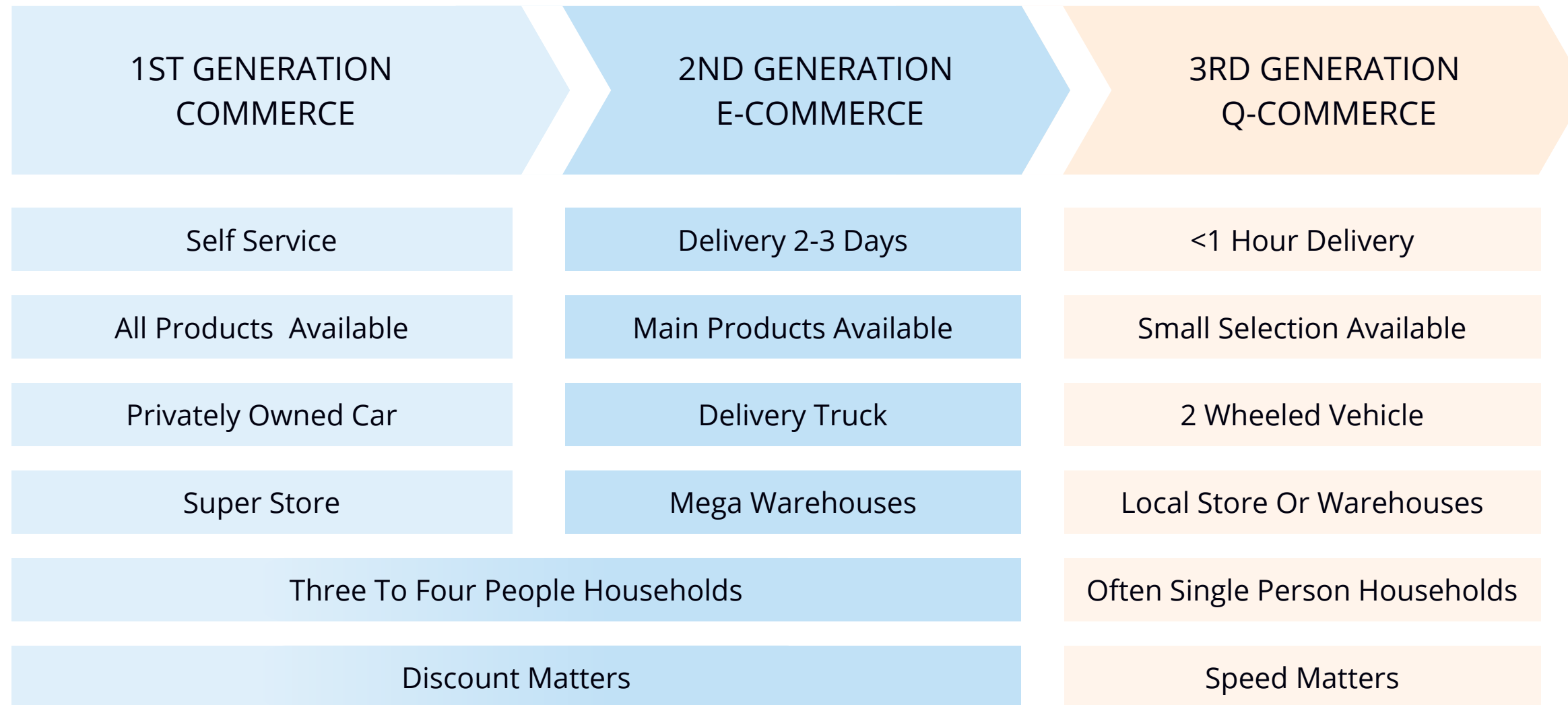


Filippo Battaini
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Ornella Urso
Senior Research Analyst

The Q-Commerce Revolution



Source: DeliveryHero, 2020



Compressed Innovation Tactics: Task Apps and the Core

Future of Digital Innovation becomes a game changer as organizations reevaluate the role of software and, to a large extent, software innovation, and this has profound implications for technology organizations.

SHORT-TERM PREDICTION

In 2021, software-led European organizations implementing compressed innovation tactics will take digital ideas to production 4 times faster than the market average.

On the road to recovery, the short-term Future of Digital Innovation prediction focuses on:

Response



Resilience



Reignition



The short-term Future of Digital Innovation prediction drives these business values:

Financial

Diversity

Ecosystem

Trust

Purpose

LONG-TERM PREDICTION

By 2023, 30% of large European organizations will implement culture as a platform to successfully operate digital innovation value chains.

On the road to recovery, the long-term Future of Digital Innovation prediction focuses on:

Response



Resilience



Reignition



The long-term Future of Digital Innovation prediction drives these business values:

Financial

Diversity

Ecosystem

Trust

Purpose



FUTURE OF
Digital Innovation

3 IDC Takeaways

- Current business disruption only accelerates the focus on hyper-speed, -responsiveness, and -development. New digital products and services need to be ramped up dramatically to fill gaps in digital value chains, and this really accelerated the shift to modular apps and more specifically "task apps" which perform or complete one aspect of a business process. This means that organizations mastering digital innovation and putting compressed innovation tactics to work will dramatically increase their competitiveness.
- In 2020, organizations with a high degree of software development and delivery maturity could push digital ideas to production in just 17 days. One example is Airbus, which maximized data across its delivery process to deliver a minimum of two aircraft a day and a million spare parts in a few hours against a year, thereby minimizing the time the aircraft is not flyable.
- Excellence in digital innovation requires the alignment of human and technology resources, but most importantly it requires that organizations think about culture as a platform. Culture as a platform provides organizations with a framework around which cultural transformation can be planned, supported, and measured.



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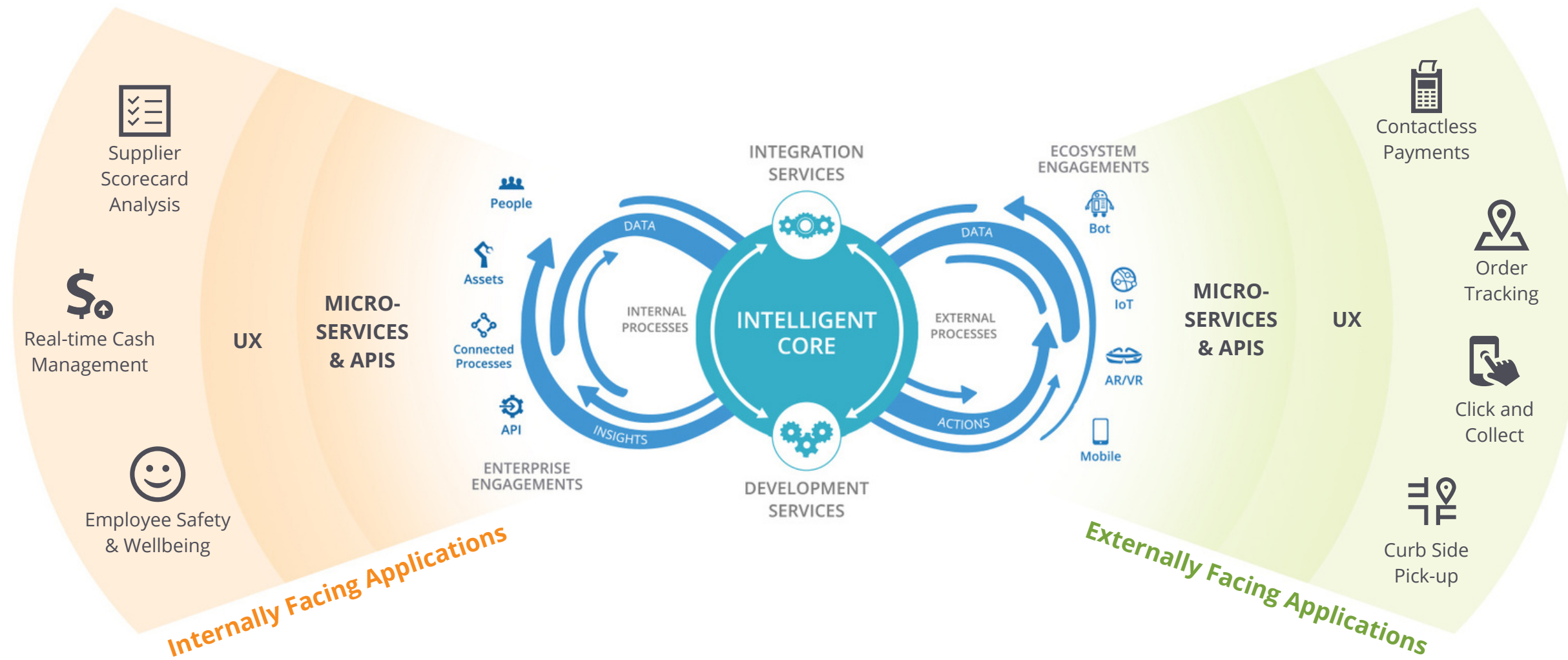
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The Need for Speed: The Rise of the Task App

Internally vs. Externally Facing



The Future CEO: Trust as a Priority

Future of Trust is an up-leveling of the security conversation to include attributes such as risk, compliance, privacy, and even business ethics as digital transformation has magnified the organization threat vector.

SHORT-TERM PREDICTION

In 2021, 40% of European CEOs will introduce trust metrics to comply with emerging ethical, diversity, and sustainable business practices.

On the road to recovery, the short-term Future of Trust prediction focuses on:



The short-term Future of Trust prediction drives these business values:



LONG-TERM PREDICTION

By 2023, trust concerns will drive 65% of large European enterprises to add regional alternatives to their cloud infrastructure estate.

On the road to recovery, the long-term Future of Trust prediction focuses on:



The long-term Future of Trust prediction drives these business values:



3 IDC Takeaways

- Trust is the glue that binds digital transformation efforts. However, the concept of trust is changing. Companies need to demonstrate that they can be trusted, expanding from security, privacy, and compliance to a holistic definition that includes brand image and ecosystem reputation. That's why CEOs need to work in hand in hand with the CISO, morphing into a Chief Trust Officer role, and the full c-suite developing new trust metrics that go beyond privacy and security covering customer experience (CX), employee experience (EX), sustainability, and diversity.
- With trust being a key differentiator by 2023, big global tech companies will struggle to provide evidence of trust in a European context. Global cloud providers will be at the forefront of this challenge in a B2B context, but the issue will also be relevant in a consumer-facing world.
- Many players will either fail to produce the metrics demanded by the market or will have to build trusted cloud partnerships with local providers. As a result, European enterprises will begin to add regional alternatives to global cloud service providers as part of their multicloud strategy. The Gaia-X federated approach to cloud could be central to this development.



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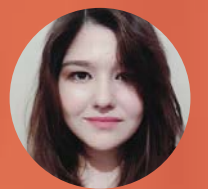
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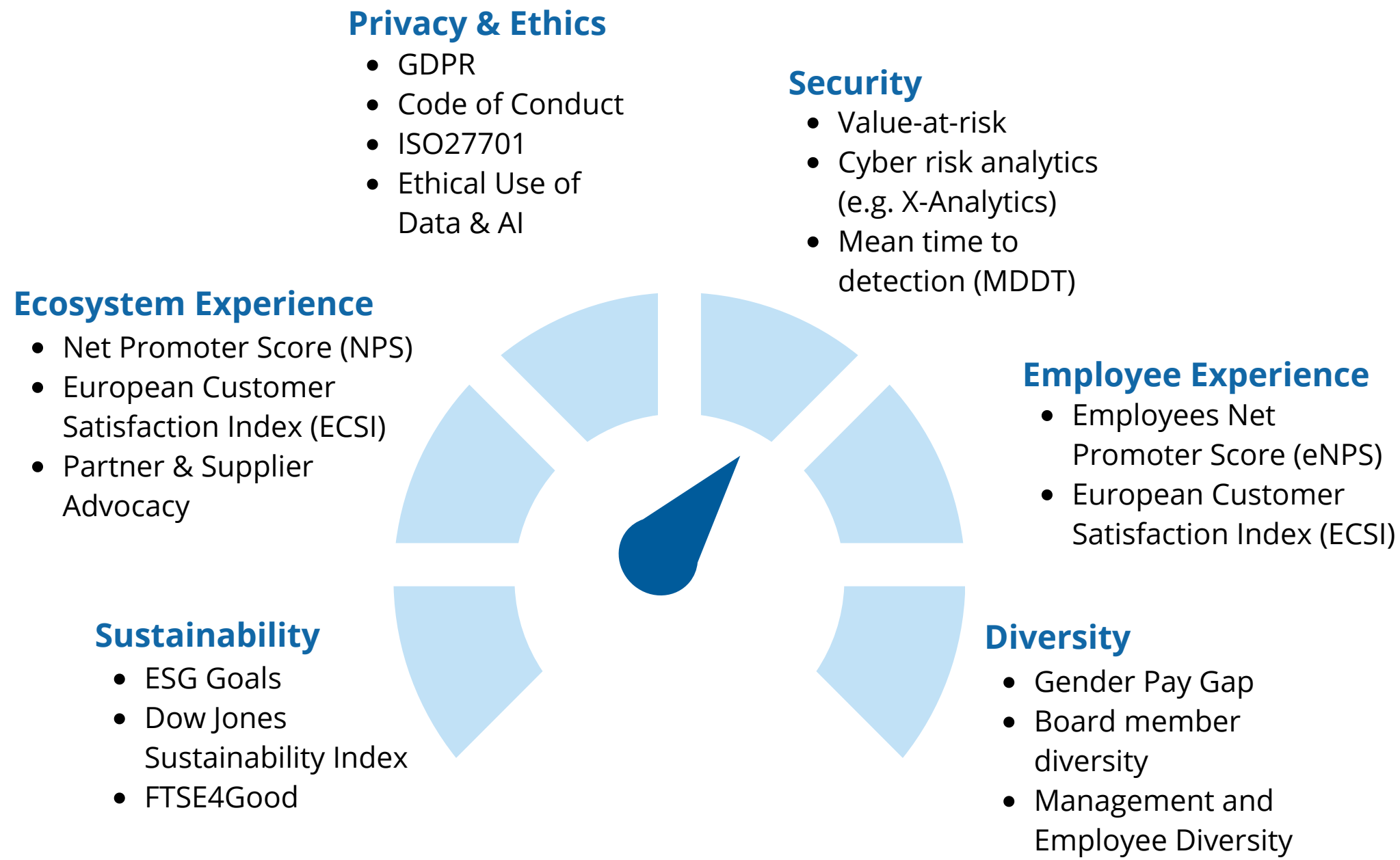
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The New Trust Metrics

Value Balancing Alliance, European Blockchain Services Infrastructure (EBSI), and Transform to Net Zero are all well-funded and backed metrics initiatives.



Sustainable Digital Economy: Digital Ecosystems

Future of Industry Ecosystem explores how industries adopt an outside-in culture, engaging in a deeply interconnected network of suppliers, partners, and customers.

SHORT-TERM PREDICTION

In 2021, more than 40% of the global cross-industry digital ecosystems based on physical products will be orchestrated out of Europe, adding \$125B in regional economic output.

On the road to recovery, the short-term Future of Industry Ecosystem prediction focuses on:



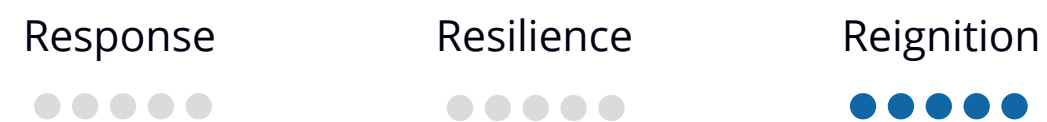
The short-term Future of Industry Ecosystem prediction drives these business values:



LONG-TERM PREDICTION

By 2023, \$2 out of every \$10 spent in Europe on ecosystem orchestration platforms and technologies will be centered around "trust" to protect the data, contracts, transactions, and intellectual property of all participants.

On the road to recovery, the long-term Future of Industry Ecosystem prediction focuses on:



The long-term Future of Industry Ecosystem prediction drives these business values:



FUTURE OF
Industry Ecosystems

3 IDC Takeaways

- Every day, networks of organizations from different sectors join forces to deliver value and foster innovation through cross-industry ecosystems. Key emerging technologies and new business constructs such as joint ventures and innovation hubs are at the heart of this transformation.
- Ecosystem orchestrators face a balancing act of encouraging open innovation while mitigating security, data, and reputational risk. A breakdown in trust could have a disastrous impact on an organization's and ecosystem's reputation and viability. As these inter-industry digital ecosystems become more prevalent, new mechanisms to manage the complexity of multi-partner IP-protection, local, regional, and international data protection requirements, cross-border transactions, and contracts will be required.
- European ecosystems will trigger an additional \$15 billion tech spending in 2021, including business consulting services, integration technologies, digital twins, edge, cloud platforms, data management and analytics, and trust-centric platforms and technologies (e.g., authentication, data loss prevention, contract provisioning, and distributed ledger technologies).



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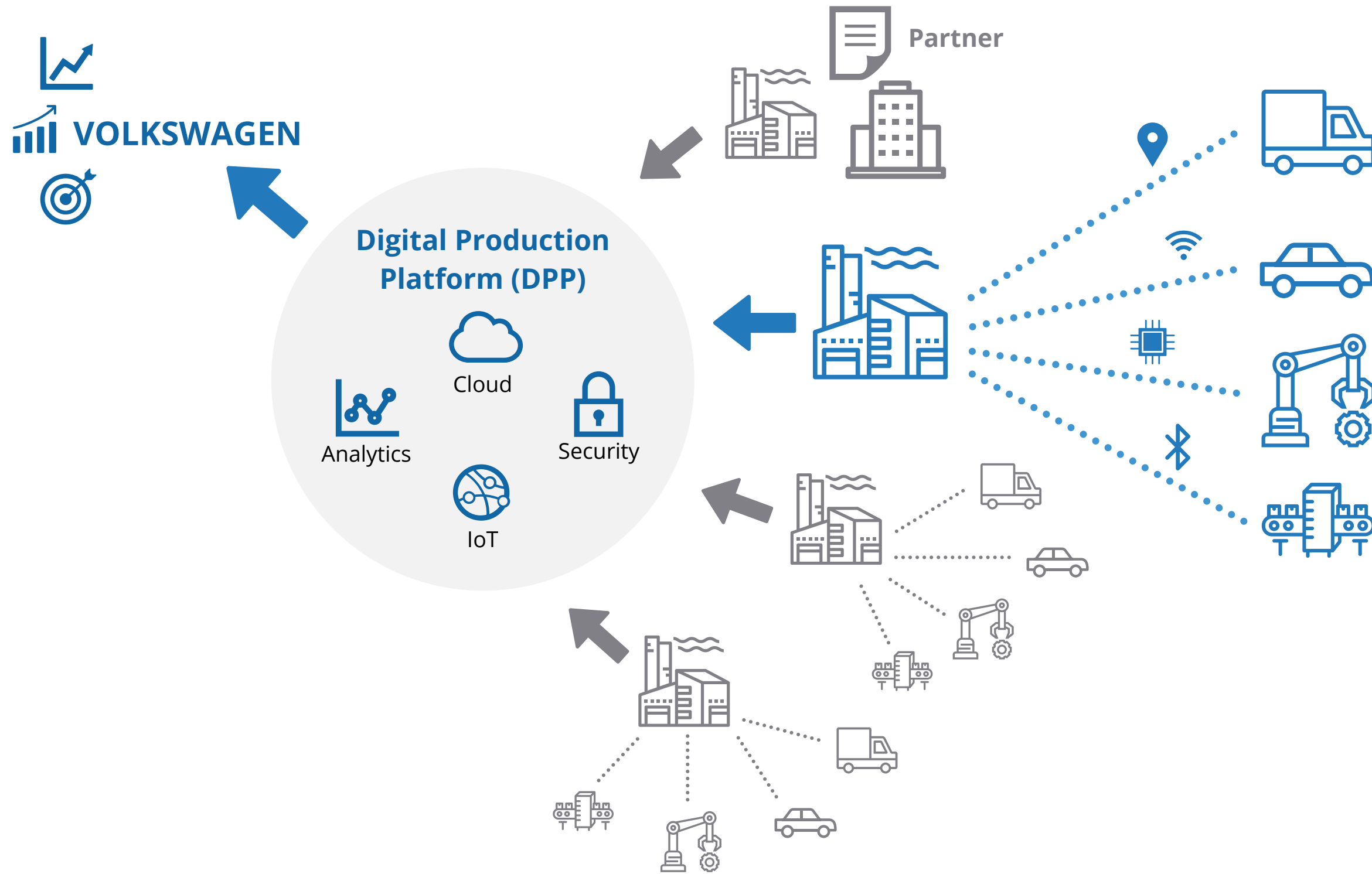


Roberta Bigliani
Group Vice President



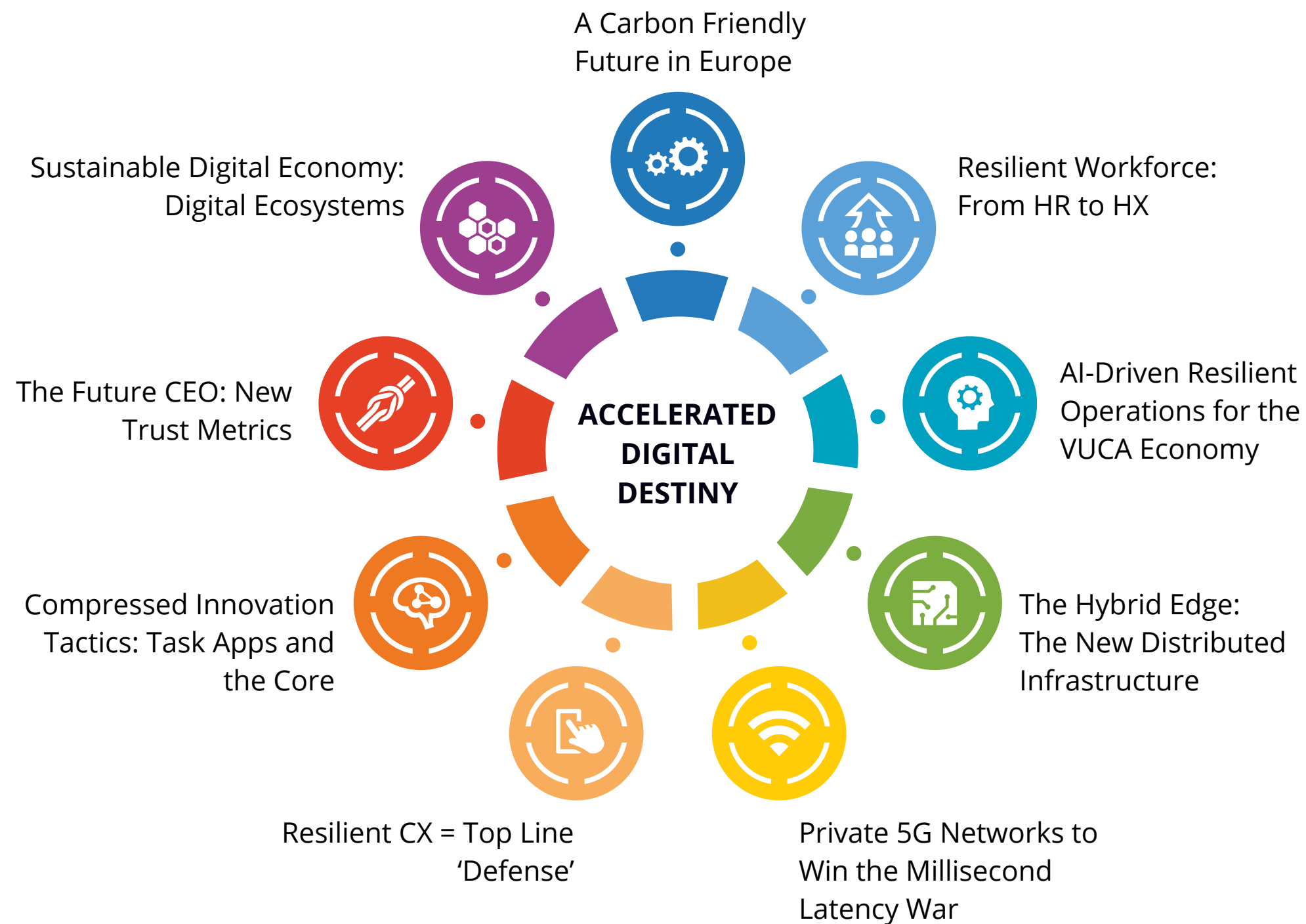
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Volkswagen: Ecosystem Based on the Digital Production Platform (DPP)



Source: Volkswagen Group

European Organizations' 2021 Actions in a Nutshell



As we head towards a digitally oriented next normal, it is clear that technology will play an unprecedented role in building the Future Enterprise.

However, operating in a next normal that is also a better normal will require a new, reframed business value approach.

For organizations, there is a need to focus on where the weak pillars are to tick all the value boxes, as they are interdependent — Financial, Ecosystem, Societal, but also Diversity and Trust! Now is the time for the forward-thinking organizations, armed with these nine agenda items, to ensure the next steps forward in the sustainable digital economy as a digital, ecosystem-driven, trusted, diverse, future-ready enterprise.

FOR MORE INFORMATION

This eBook is based on research from the IDC FutureScape: Creating a Sustainable Digital Economy in 2021 and Beyond.

Contact your account representative or watch the IDC Webinar Presentation: [FutureScape 2021: Creating a Sustainable Digital Economy in 2021 and Beyond](#)

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