

Our Future

3 Mega Trends That Will Transform Your Consultancy

Coskun Tuzgol
Regional Director Europe
BST Global

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The “Big” Shift

The Millennial Generation:

Another Baby Boom



74.9M

BABY BOOMERS

Ages: 51-69

75.3M

MILLENNIALS

Ages: 18-34



The Millennial Generation:

Another Baby Boom

*The first generation to be raised on
cell phones and the Internet.*

Millennials are always connected.



The Millennial Generation

They are "digital natives" that will lead society into a world of personal disclosure and information sharing using new media.

They love to share. And, it's going to stay that way.



Millennials Expect Flexibility & Like Technology @ Work

Millennials = Expect Flexible Work Hours

- **Many = expect to be mobile & work from home / office / cafes at will.**
- **~20% = identify as 'night owls'** (often work outside normal business hours).
- **38% = freelancing** vs. 32% among those over 35 years old.
- **32% = believe they will be working 'mainly flexible hours'** in future.

Millennials = Tech Savvy

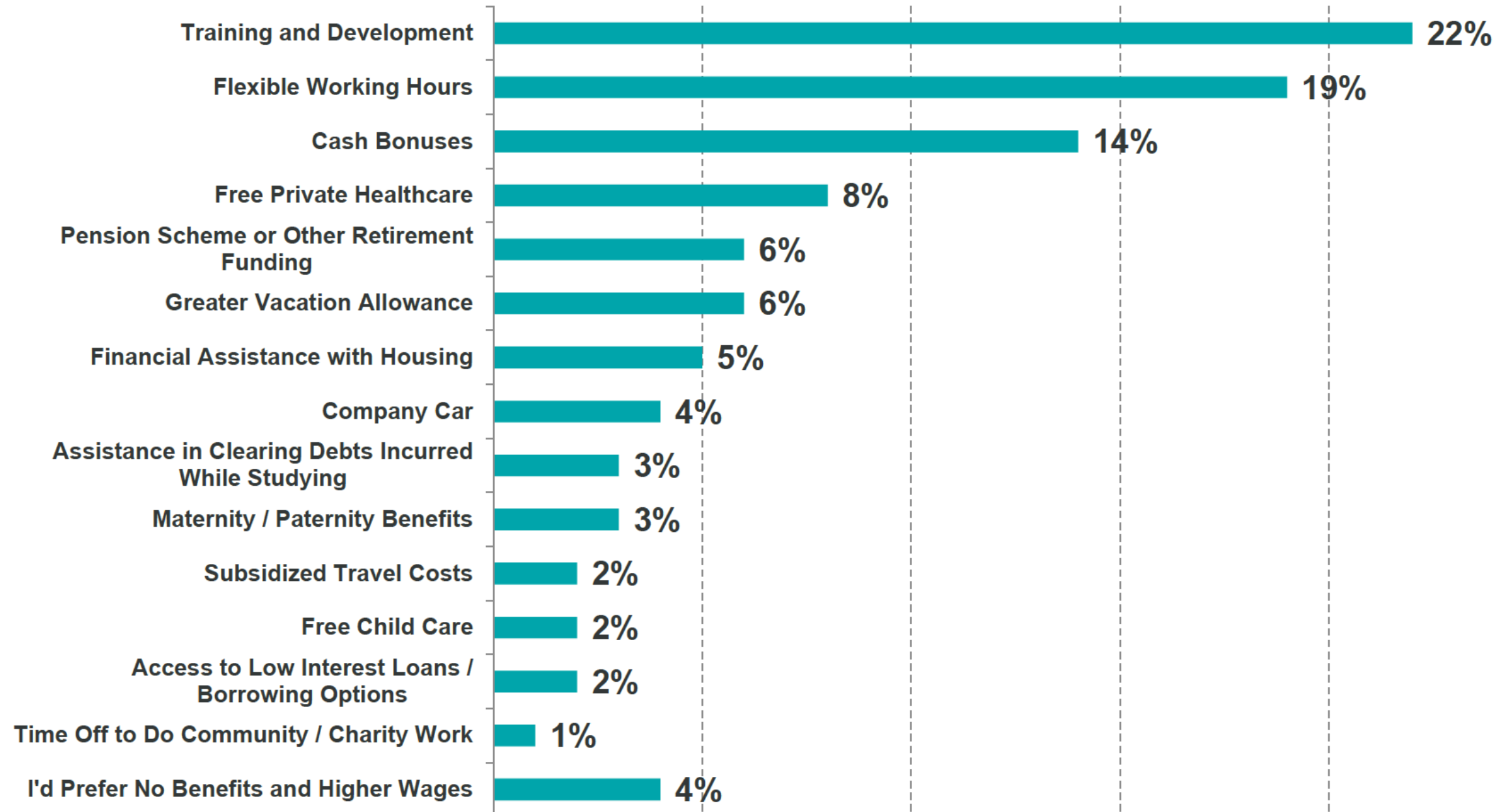
- **34% = prefer to collaborate online** at work as opposed to in-person or via phone (vs. 19% for older generations).
- **45% = use personal smartphones for work purposes** (vs. 18% for older generations).
- **41% = likely to download applications to use for work purposes in next 12 months & use their own money to pay for them** (vs. 24% for older generations).

Millennials' Most Valued Work Benefits =

1) Training & Development 2) Flexible Hours 3) Cash Bonuses

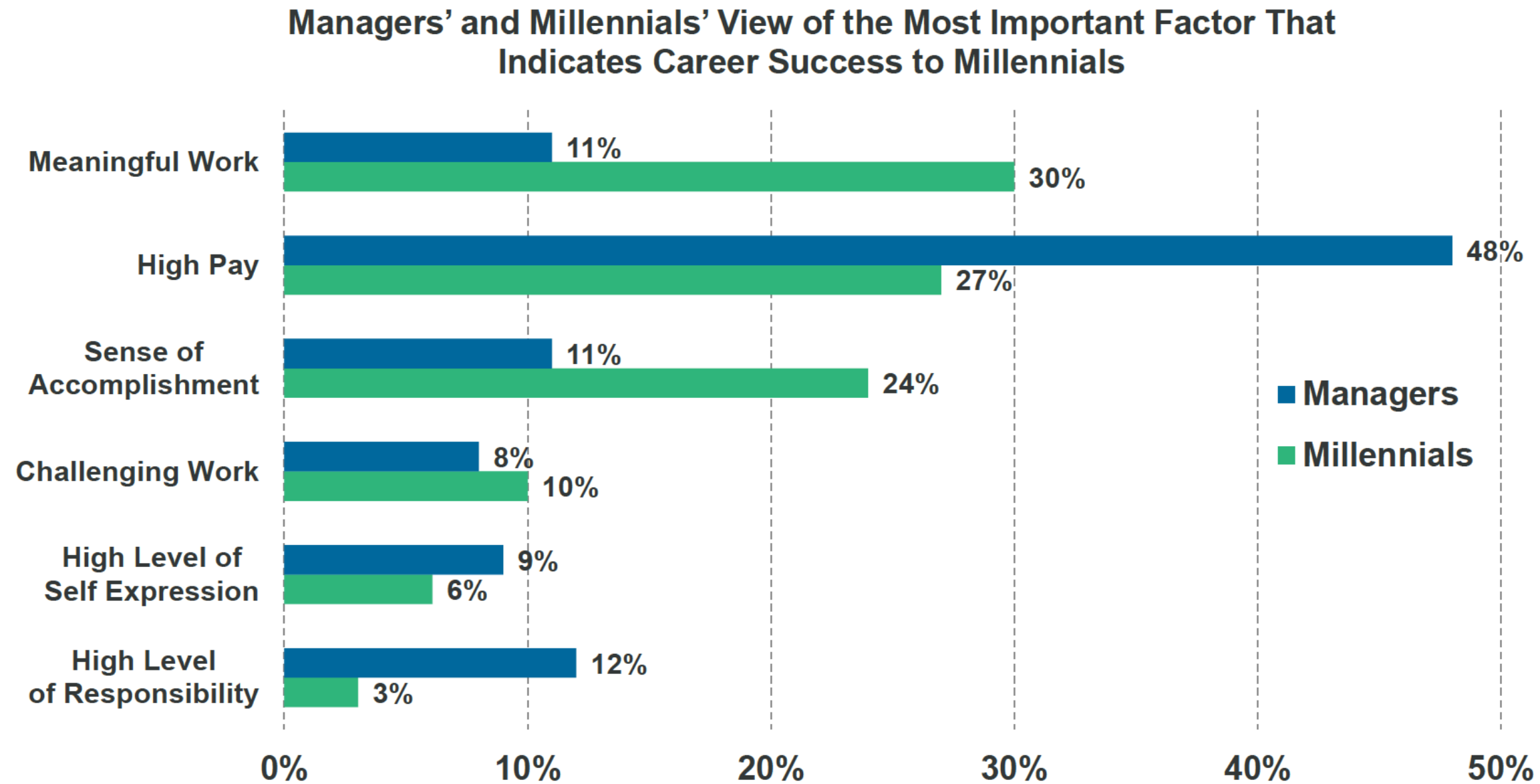
Which Three Benefits Would You Most Value From an Employer?

% Ranking Each 1st Place, Global



Millennial Work Values = Perception Disconnect?

Most Important Thing to Millennials = Meaningful Work
What Managers Think Is Most Important Thing to Millennials = Money



The Millennial Generation

Median years with employer

2



GEN Y

5



GEN X

7



**BABY
BOOMERS**

10

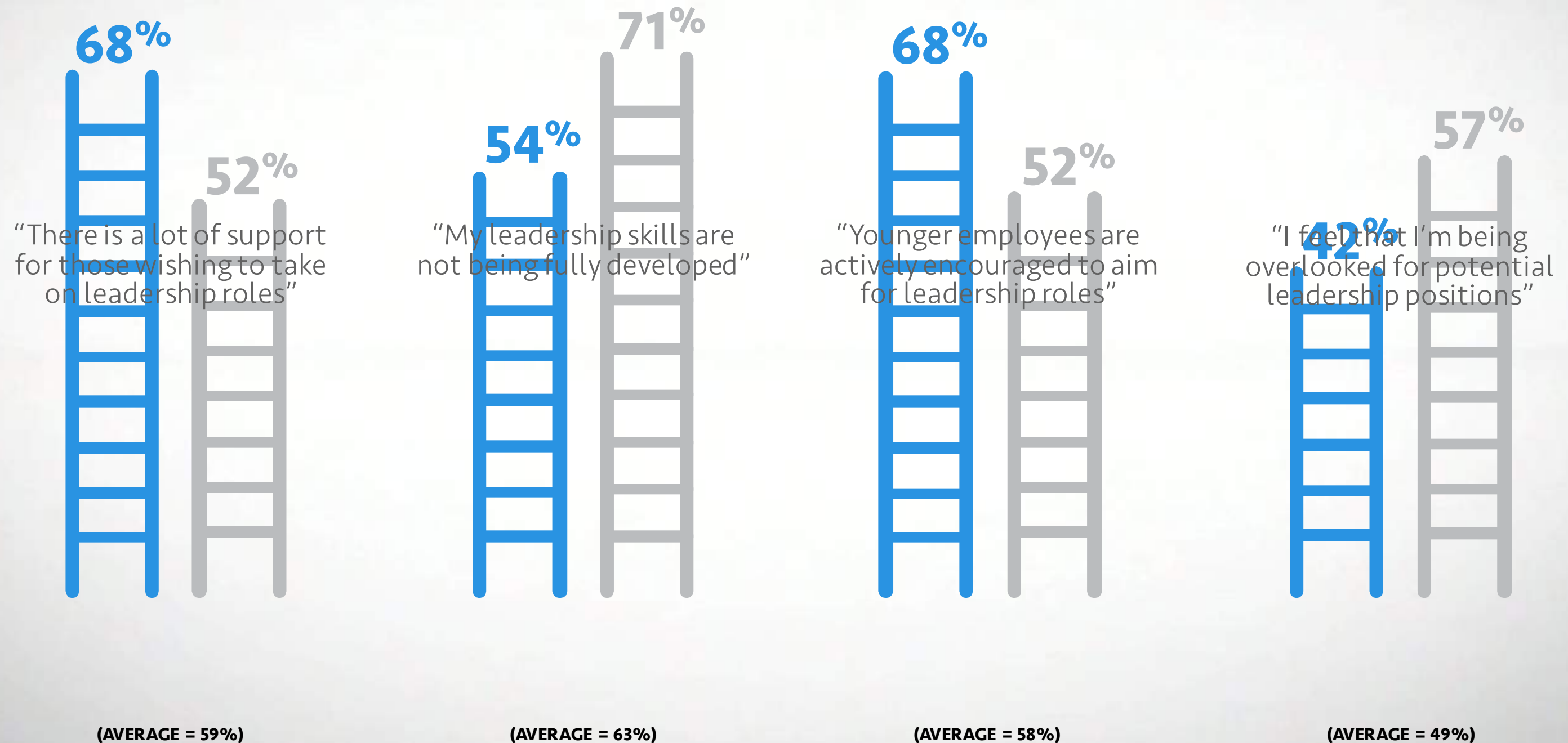


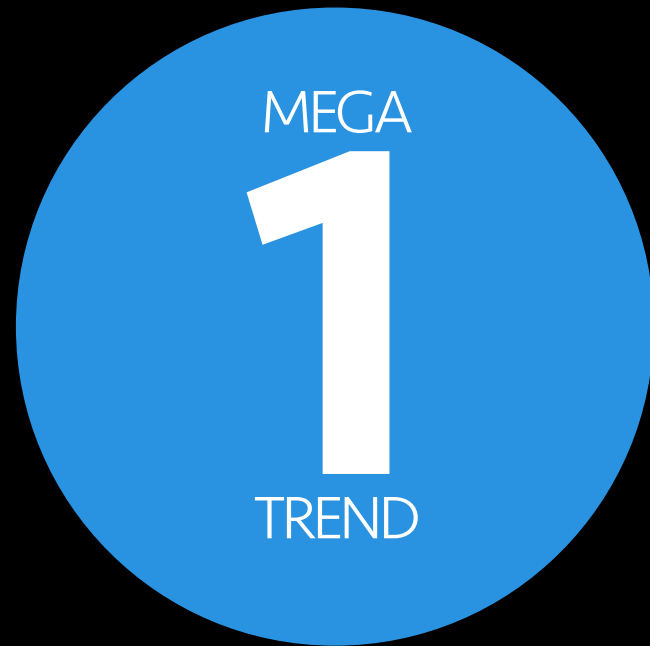
**SILENT
GENERATION**

The Millennial Generation

Millennials want to grow and they won't wait around

■ STAY MORE THAN 5 YEARS ■ LEAVE WITHIN 2 YEARS





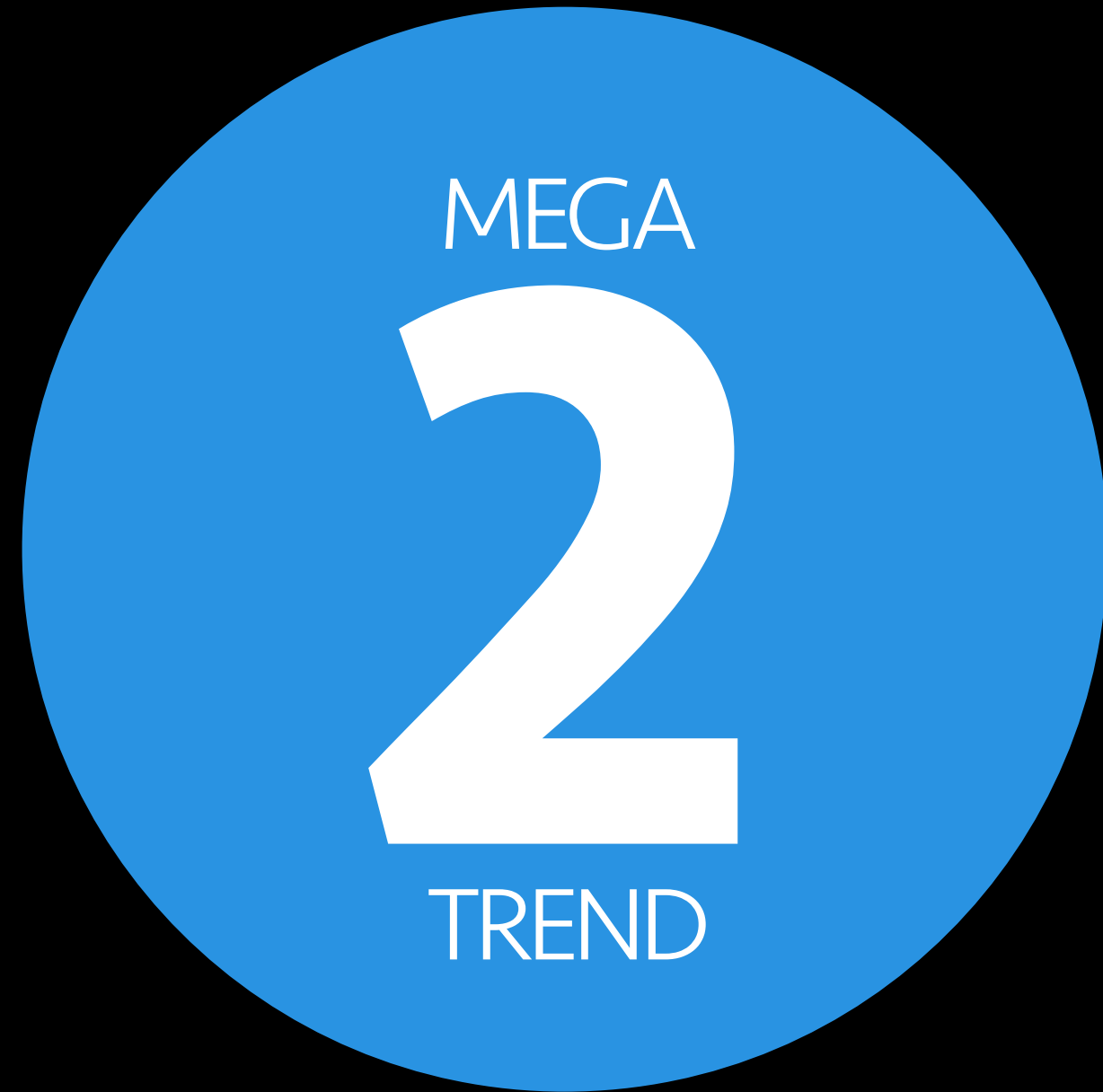
The
"Big" Shift

The Takeaways

Reimagine Your Work Environment

Consumerization of Software

Embrace The Opportunity

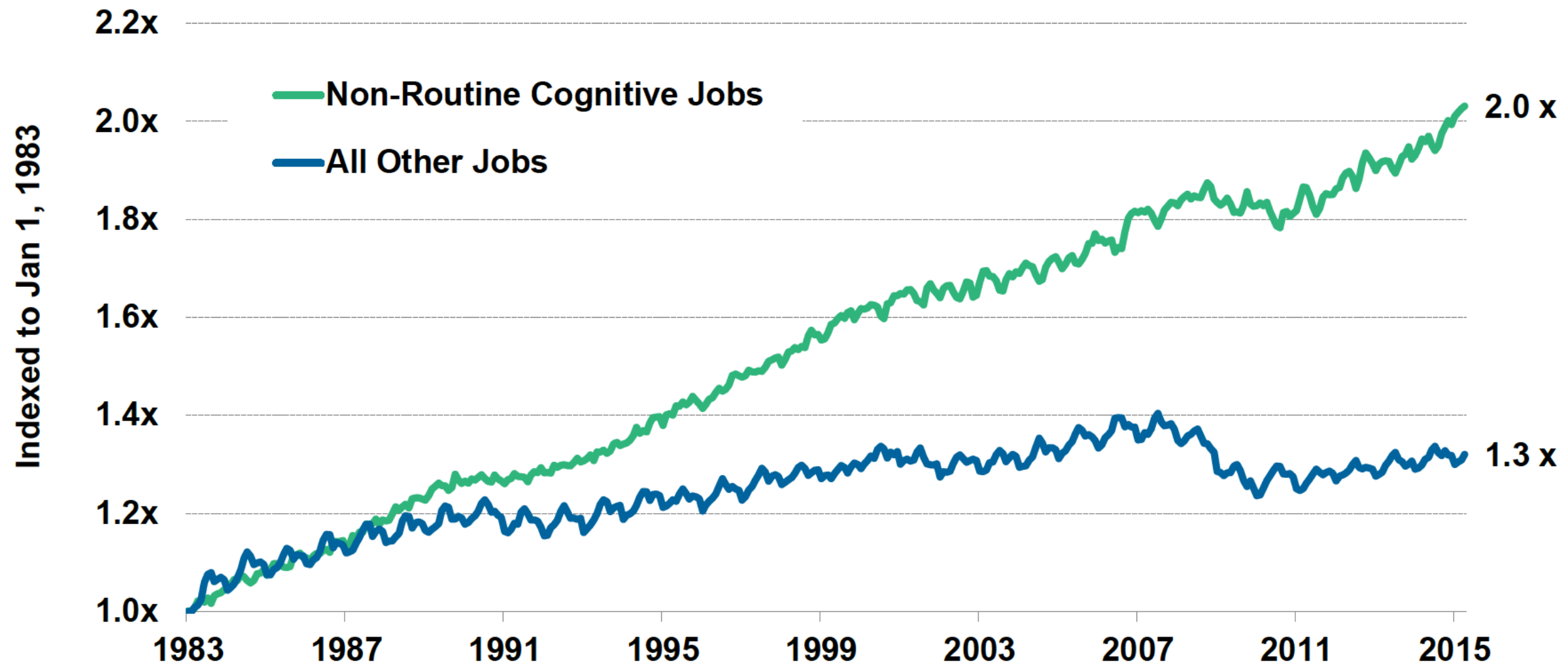


The Rise of “Knowledge”

High-Skilled / Knowledge-Based Jobs Grew 2x Since 1983... While Other Jobs Grew Just 1.3x

Non-Routine Cognitive Jobs = High-Skilled and Requires Flexibility, Creativity, Problem Solving

**Non-Routine Cognitive Jobs vs. All Other Jobs Growth,
USA, 1983 – 2015 (Indexed to Jan 1, 1983)**



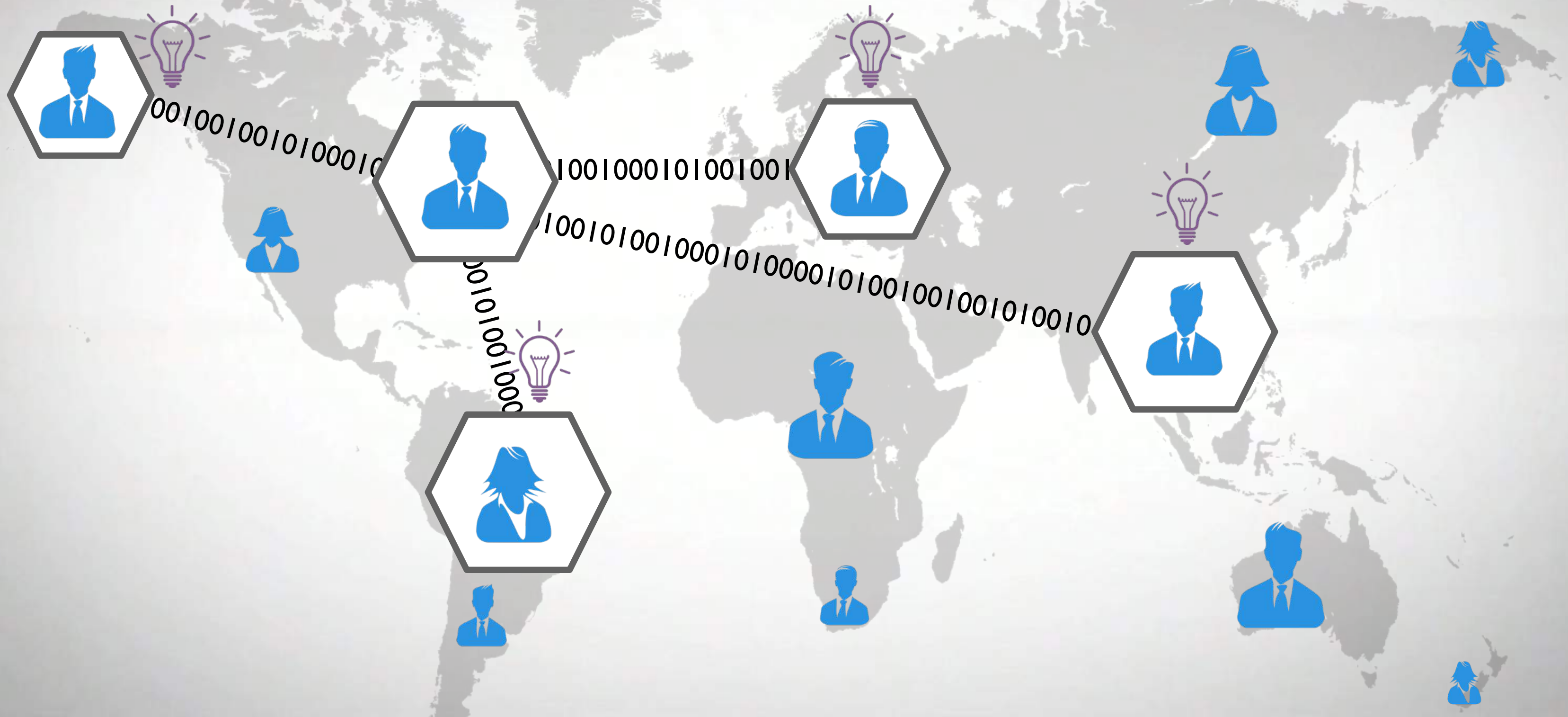
Knowledge Management



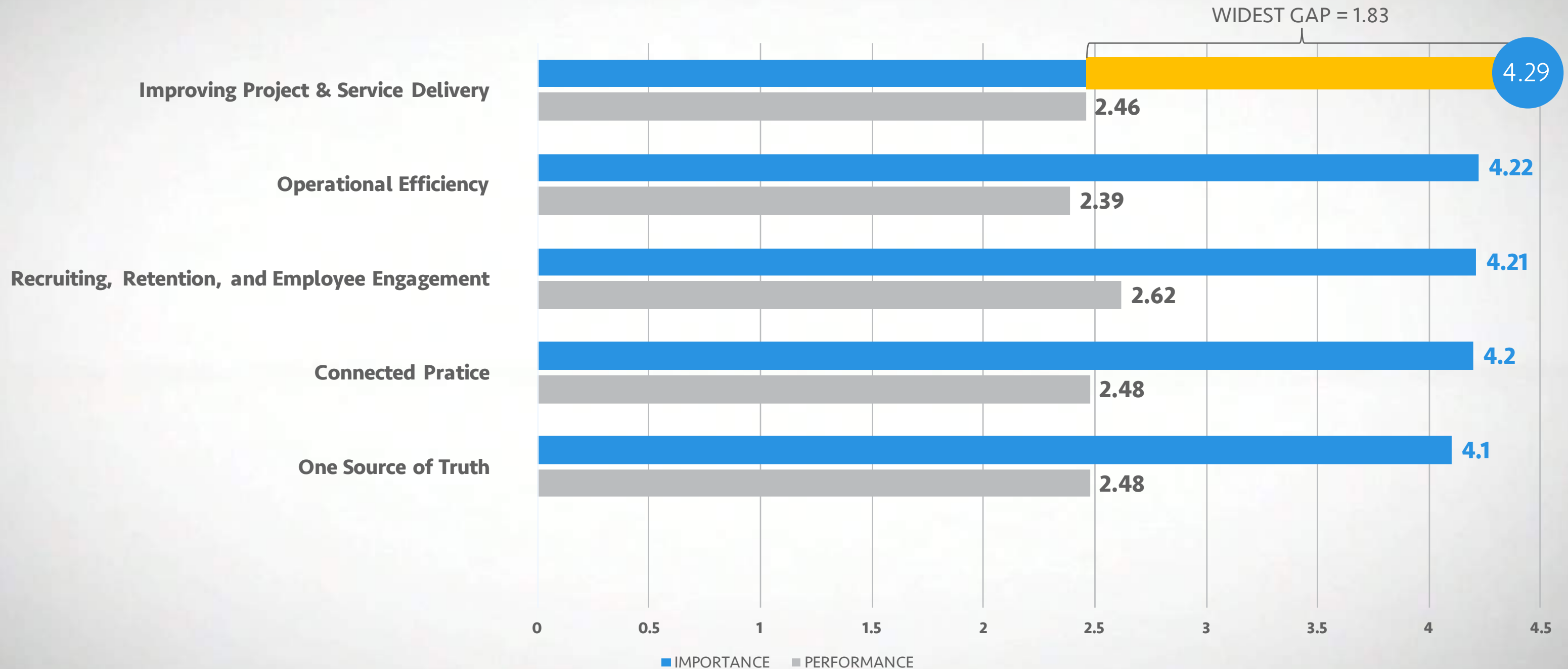
Collaboration



Data-driven Decision Making



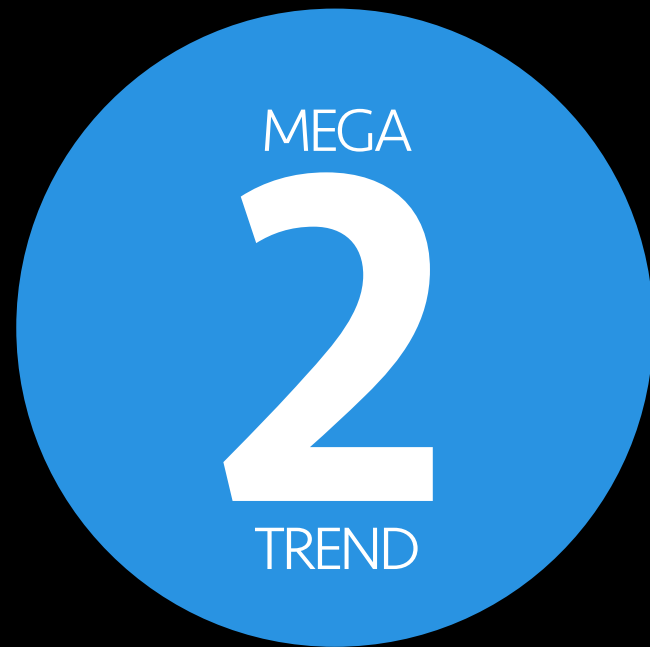
Strategic Priorities for KM











The Rise of
Knowledge

Call to Action

Foster Social Business Enterprise

Create a Collaborative Physical Environment

Develop a KM Strategy



The Internet of Things

What is the Internet of Things?

The **Internet of Things** connects devices such as everyday consumer objects and industrial equipment onto the network, enabling information gathering and management of these devices via software.



50B

Things connected to the
Internet by 2020

A market impact of

14.4T

by 2023

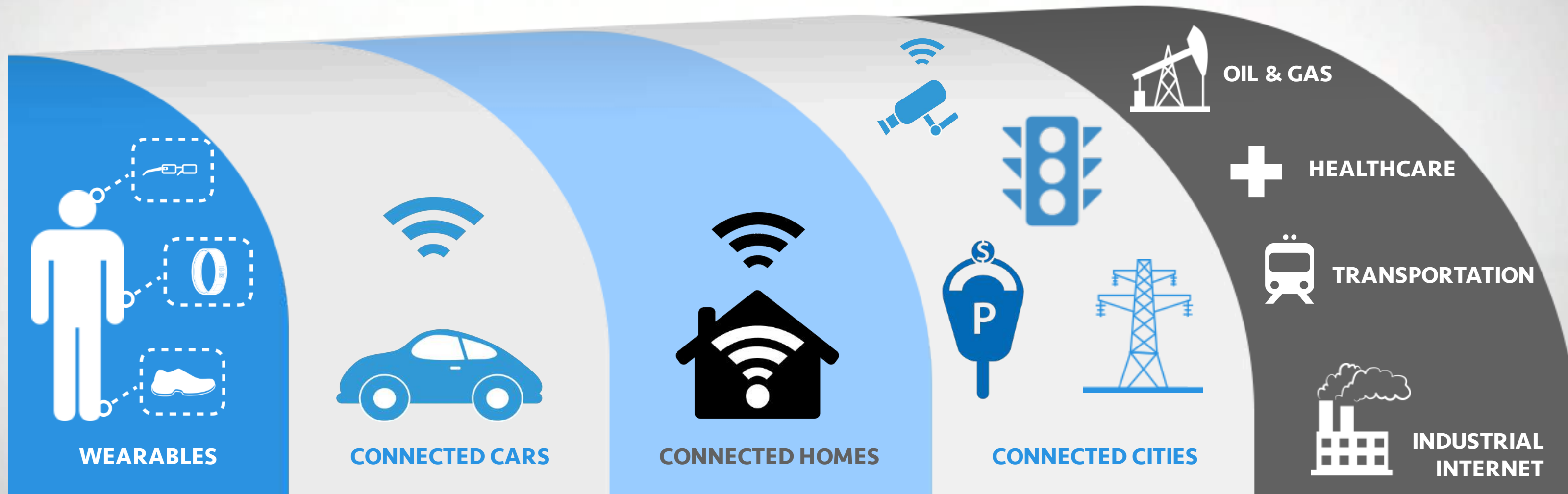
1T

Things connected to the
Internet by 2025

IoT



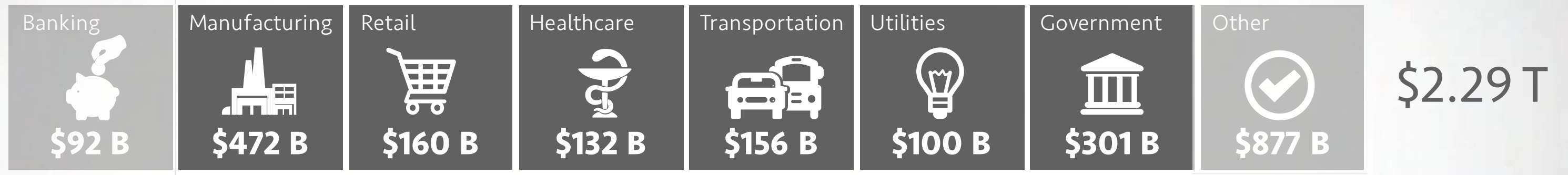
5 Key Verticals of IoT Adoption



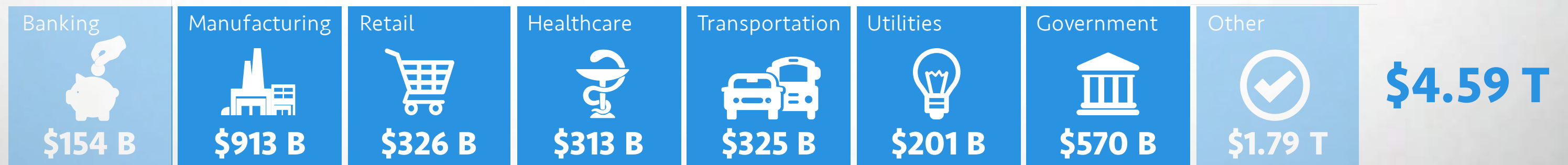


Worldwide IoT Revenue Opportunity

2014

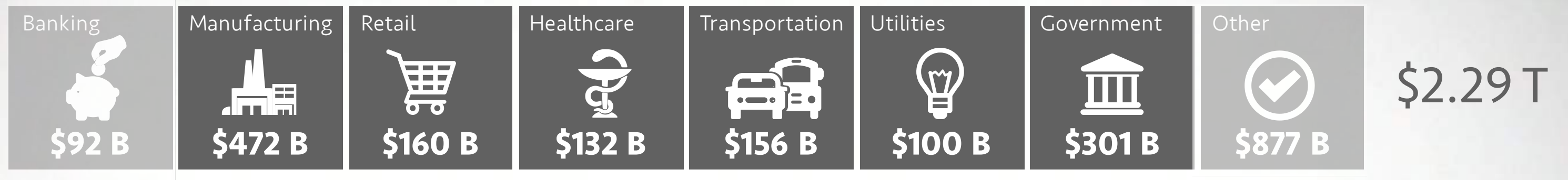


2018



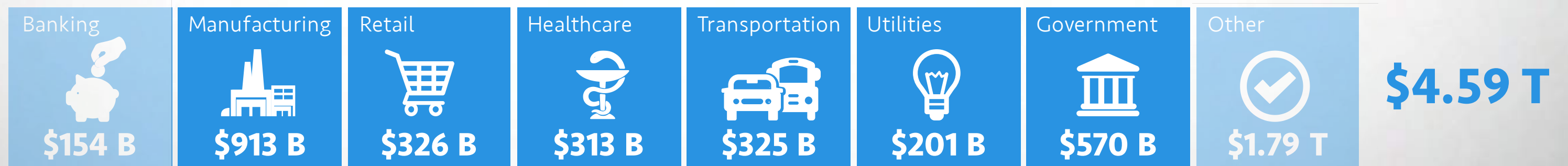
Worldwide IoT Revenue Opportunity

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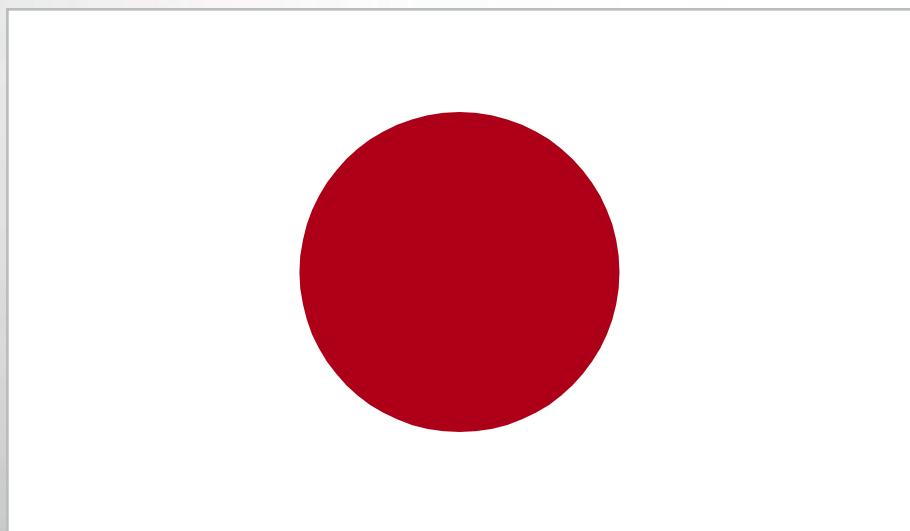


67%
INCREASE

2018



Who's Leading the Charge?



Japan

Strive to make the country the
“world’s most advanced IT nation.”

Establish a council of
public-and private-sector organizations

China

TOTAL INVESTMENT
\$771M

5 year plan for development of the IoT
“Special Fund”

Issues support smart city with focus on
smart utilities and transportation.

Singapore

Launched its Smart Nation initiative

Focus prominently on large scale deployments of smart city applications and **private sector deployment** of the technology

TOTAL INVESTMENT

\$1.6B



India

TOTAL INVESTMENT
\$7.4B

Established a policy to support digitization efforts and grow IoT.

Leverage the IoT for a wide variety of
public-and private-sector applications

Develop 100 smart cities



South Korea

Developed the world's first smart city, Songdo International Business District

An additional \$5B is planned investments in IOT through 2020

TOTAL INVESTMENT

\$5B

United States

TOTAL INVESTMENT
\$250M

Launched its Smart Cities Challenge
Announced seven finalist cities

Source: Center for Data Innovation December 16, 2015; Why Countries Need National Strategies for the Internet of Things

Source: Transportaion.Gov March 26, 2016; U.S DOT Announces Seven Finalist Cities for Smart City Challenge

Germany

Plans to modernize its manufacturing sector.

Support industry, academic and government research and development efforts to advance **“smart factory”** technologies.

TOTAL INVESTMENT

\$221M

Key Takeaways

Asia-Pacific is the front line for IoT investment.



India

\$7.4B

South Korea

\$5B

Singapore

\$1.6B

China

\$771M

\$15B

INVESTMENT

NEXT

5

YEARS

ENCOURAGE

P3

AS PRIMARY



The Internet of
Things

Call to Action

Get Positioned Now!

“Disrupt” or be “Disrupted”

Thank You

bstglobal.com

ctuzgol@bstglobal.com