

Emerging Landscape of IT

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**SOME PEOPLE DON'T LIKE CHANGE
BUT YOU NEED TO EMBRACE CHANGE
IF THE ALTERNATIVE IS DISASTER**



TOP TECHNOLOGY TRENDS FOR 2016



The Device Mesh



Internet of things



Information of Everything



Adaptive Security Architecture









Advanced Machine Learning



GCC Oil economies

Impact of oil at \$43 per barrel on budgets/trade gaps

					
Saudi Arabia	Kuwait	Bahrain	UAE	Qatar	Oman
Break even price (per barrel)					
\$87.20	\$49.40	\$127.10	\$73.80	\$60.00	\$102.60
Change in percentage of trade surplus/deficit due to a fall in oil prices in 2015 (as a percentage of gdp)					
-1.00%	15.70%	-2.10%	5.30%	8.40%	-15%
Change in percentage of budget surplus/deficit due to a fall in oil prices in 2015 (as a percentage of gdp)					
-14.20%	6.20%	-9.90%	-3.00%	5.60%	-14.80%
Measure undertaken to increase/contain the deficit					
Not undertaken any measure but a spending package of 4% of GDP given in Feb 2015.	Cut in public spending, capital spending to be shielded.	Raised natural gas prices for industries, increased medical insurance fees.	Removed subsidy on petrol and diesel in July.	Continues its policy of restraining current expenditures.	Reduction in defence spending, capital spending shielded.

Source: IMF

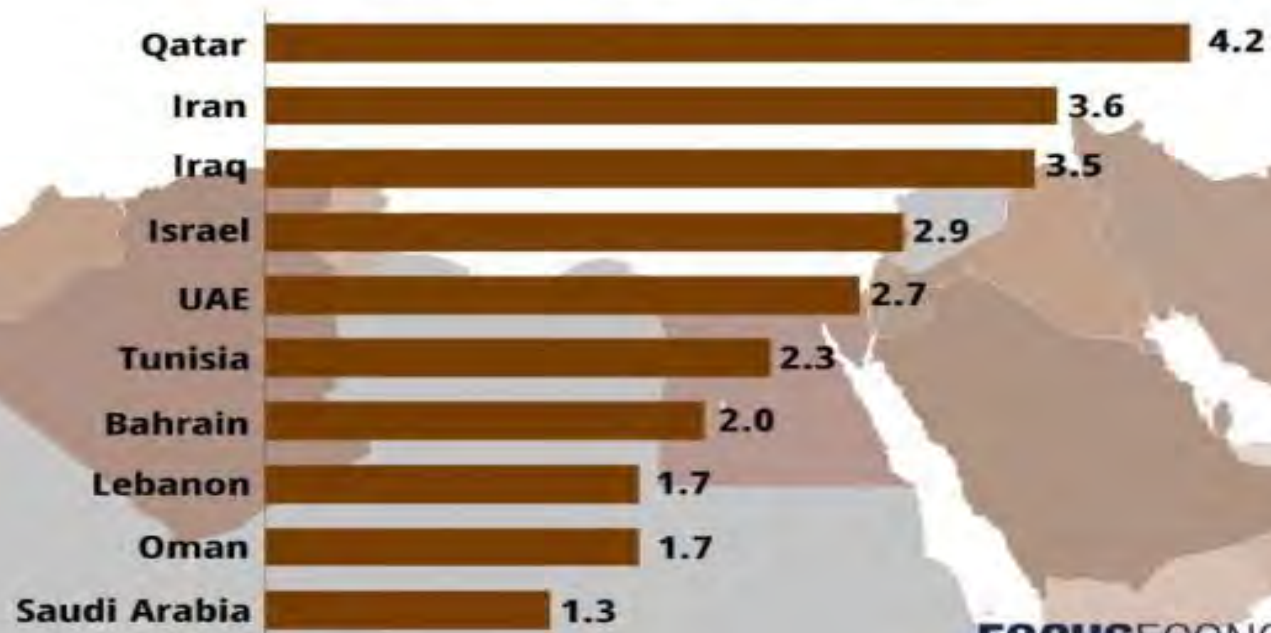
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MENA GDP Forecast

MIDDLE EAST & NORTH AFRICA 2016 GDP GROWTH FORECASTS

Low oil prices and mounting political threats
led analysts to revise down the outlook for
10 of the 16 economies in the region

MENA's GDP growth outlook
expected at 2.6%
this year



FOCUSECONOMICS

FocusEconomics Consensus Forecast MENA - March 2016

ICT Spending in META

Middle East, Turkey and Africa

Trend 1: The META ICT Market Will Grow to \$260 Billion in 2016

Declining Oil Prices

Return to Stability

Political Instability

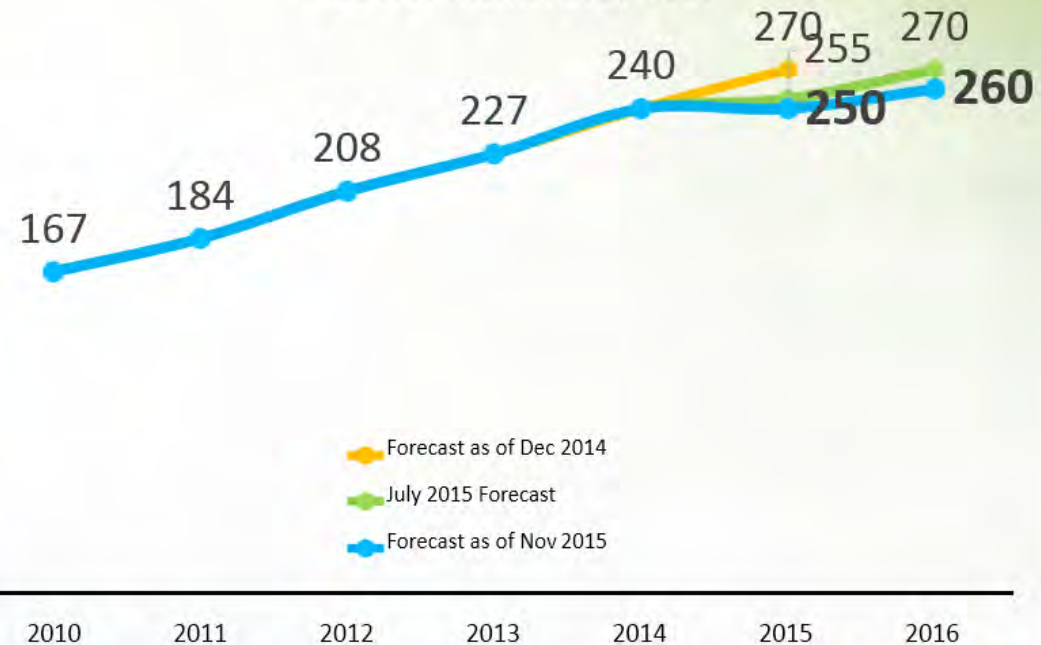
Prioritized Spending

Currency Fluctuations

Software and Service Growth

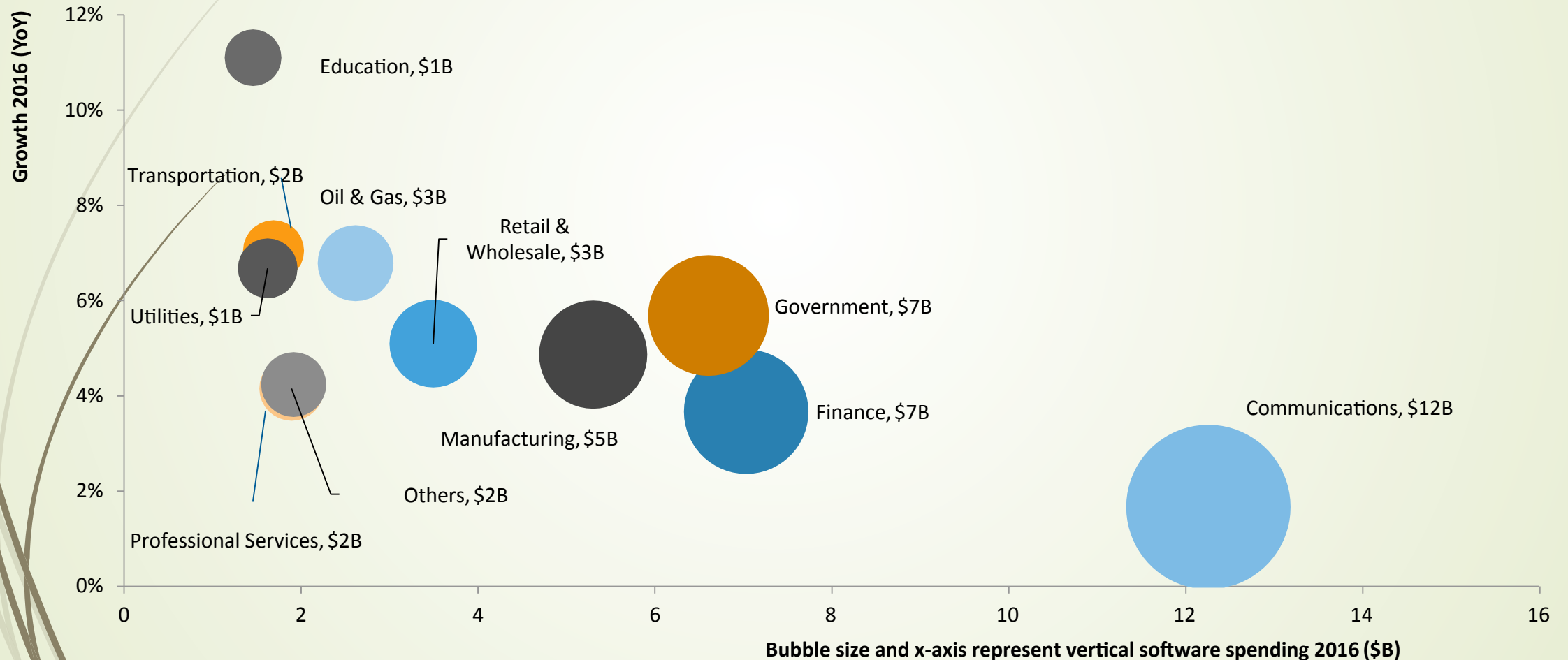
3rd Platform Innovation
Leading Digital Transformation to Scale

META ICT Market 2010-2016



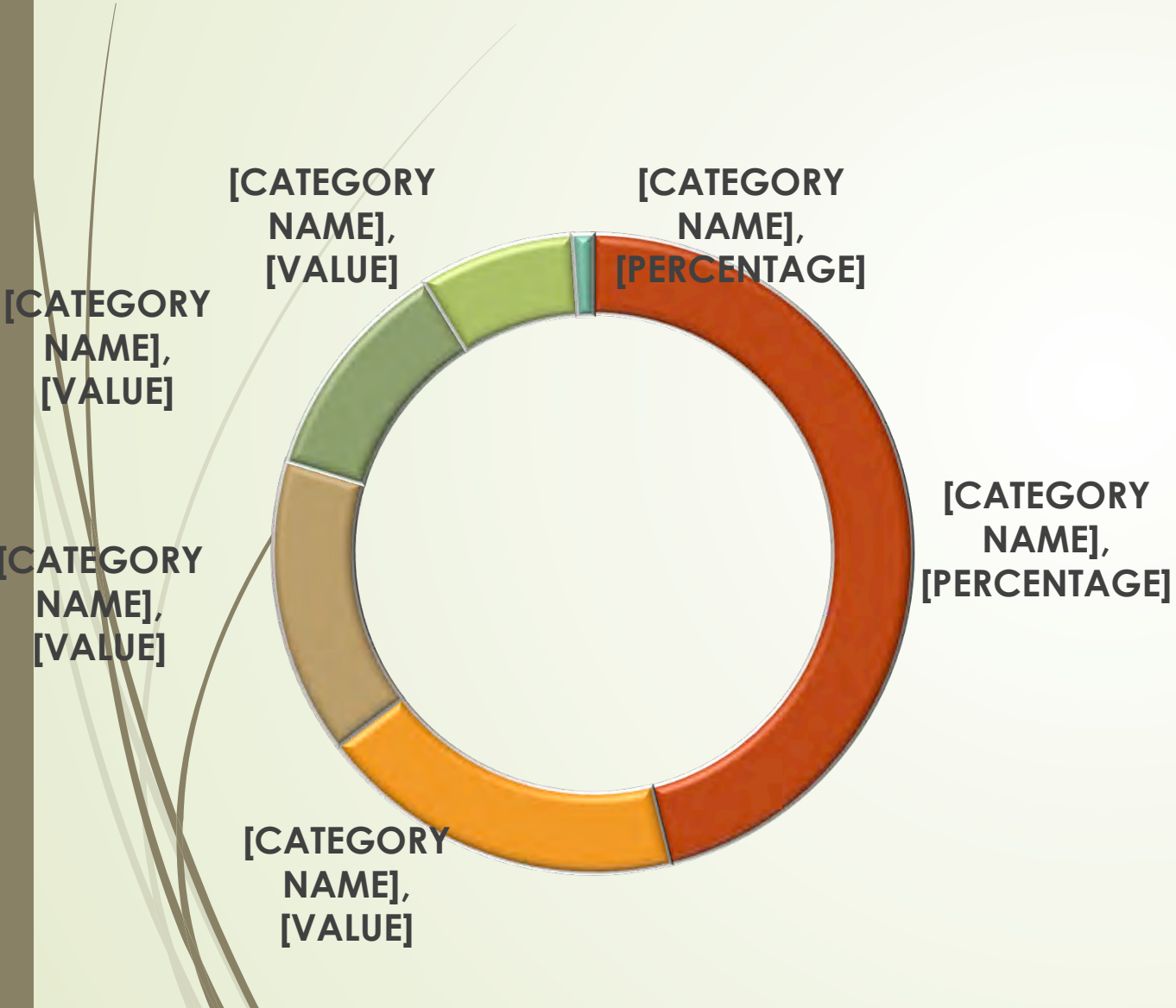
All data held constant to USD base year 2014

IT SPENDING BY VERTICAL IN META



Source: IDC MEA Verticals Database Q2 2015. Note: Others – agriculture, construction, mining, personal services.

2016 IT Spending in META



- Investments are going to drive third platform — cloud, mobile, social and big data and analytics.
- By 2018, at least half of IT spending will be cloud based, reaching 60 per cent of all IT infrastructure and 60-70 per cent of all software services, and technology spending by 2020.
- IT security as the fastest growing segment in the industry, growing 12-15 per cent annually and stays at the top if IT initiatives.
- For this year, the analysts expect smart city and transport projects to help stimulate overall IT spending in the Middle East, while a lack of legacy infrastructure will spur new IT purchases in Africa, as buyers will be able to move faster on new acquisitions.



Future of Distribution

INNOVATE

DISRUPT

LEAD



Over next 5 years, our resellers will change

WHAT they sell...

Hybrid IT
Software-defined
infrastructure

Cloud
Security
Analytics

Managed services
Mobility

HOW they sell...

Business
outcomes
Professional
services-led

Service level
agreements
Annuity
revenues

From IT
supplier to
strategic
partner

WHO they sell to...

CIO

Lines of
business

Born in the
cloud

Developer
teams

Internal
service broker

Channel Evolution

TODAY

- Business as usual
- Lead with product and Price
- Wait for vendor to lead
- “Technical Services”
- Technology Sales People
- Sell to IT
- Resell and support Vendor Products
- Heavy asset investments

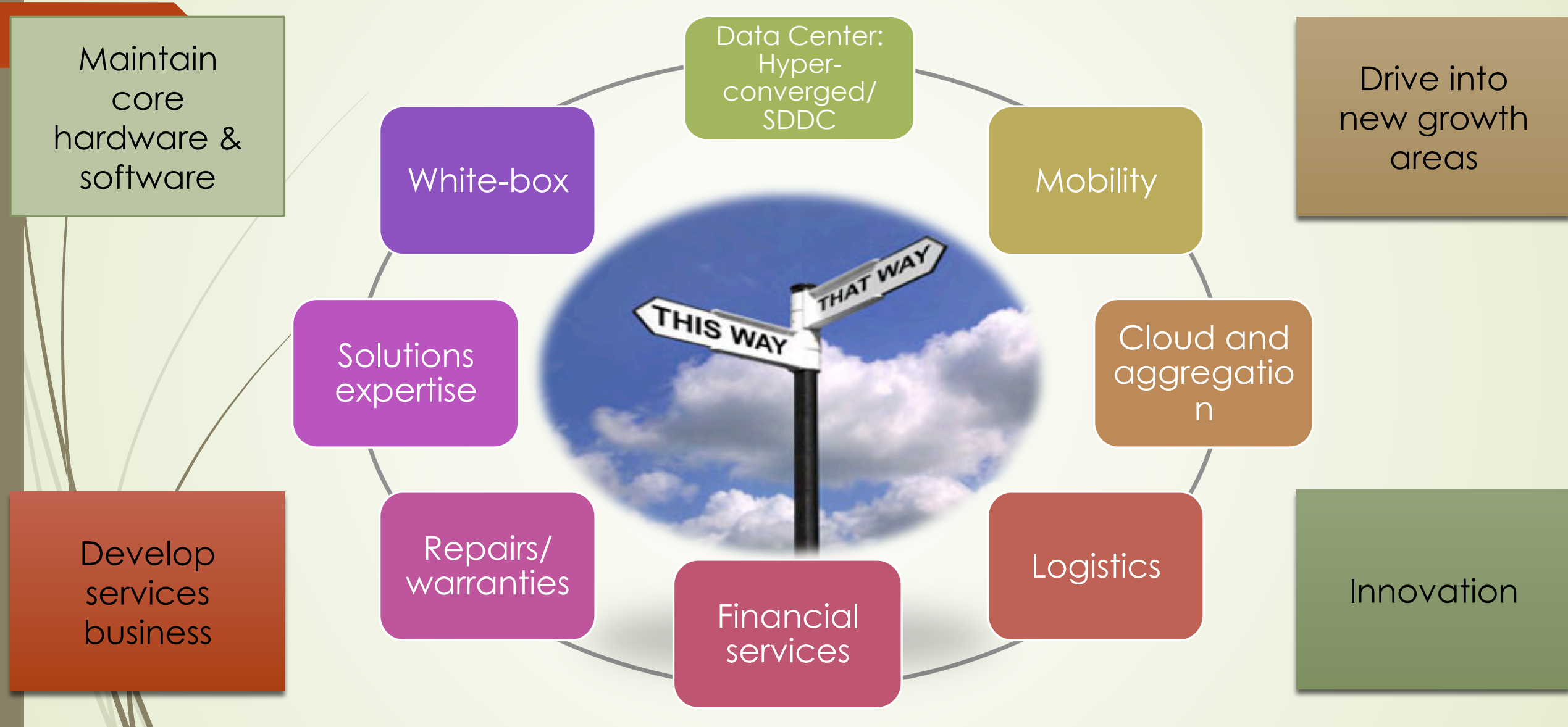


TOMORROW

- Meet new market demand
- Solutions- Business Outcomes
- Map out your own course
- “Professional” Services
- Business Sales Talent
- Sell to Business Leaders
- App and S/W Development
- Build on the back of CSP

“TOTAL CUSTOMER EXPERIENCE”

Our strategies to reflect this shift



Redcloud – Redington Marketplace

Redington
Cloud
Market
Place with
Multivendor
Cloud
Services

Monthly
Billing across
multiple
cloud
services

Cloud
Migration
Consulting &
Cloud
Solutions

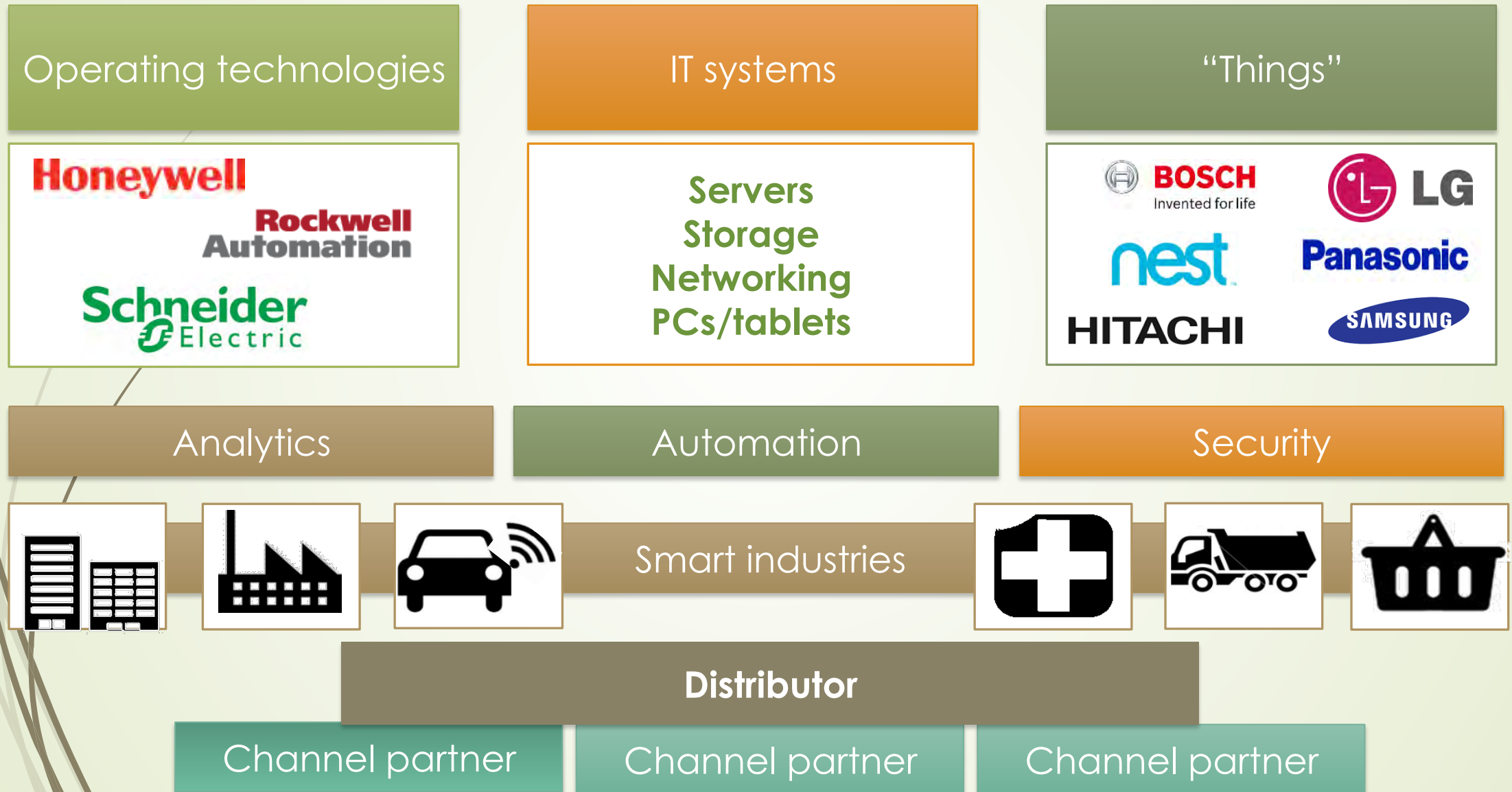
Lead
Generation
& Digital
Marketing
Support

Deployment
& Migration
Services,
Customer
Support

White
Labelling
commerce
platform &
Managed
Services

Business
Intelligence;
Cross sell;
Upsell
motion

Distribution Role in IoT Ecosystem



Red Vault – INNOVATION CENTRE





**WHAT GOT YOU HERE
WON'T GET YOU THERE**





What makes a company valuable?

- Superior competitive advantage
- Sustained Earnings Growth
- Positive Cash Flow



5 Channel commandments

- Don't Scale too fast(Do not take Risks you cannot Manage).
- Don't pick a fight with everyone.
- You can only improve what you can measure.
- Tough times don't last ,Tough people do.
- Learn from others don't reinvent the wheel (Listening, Watching & Reading are the 3 most underrated but most important things you can do!).