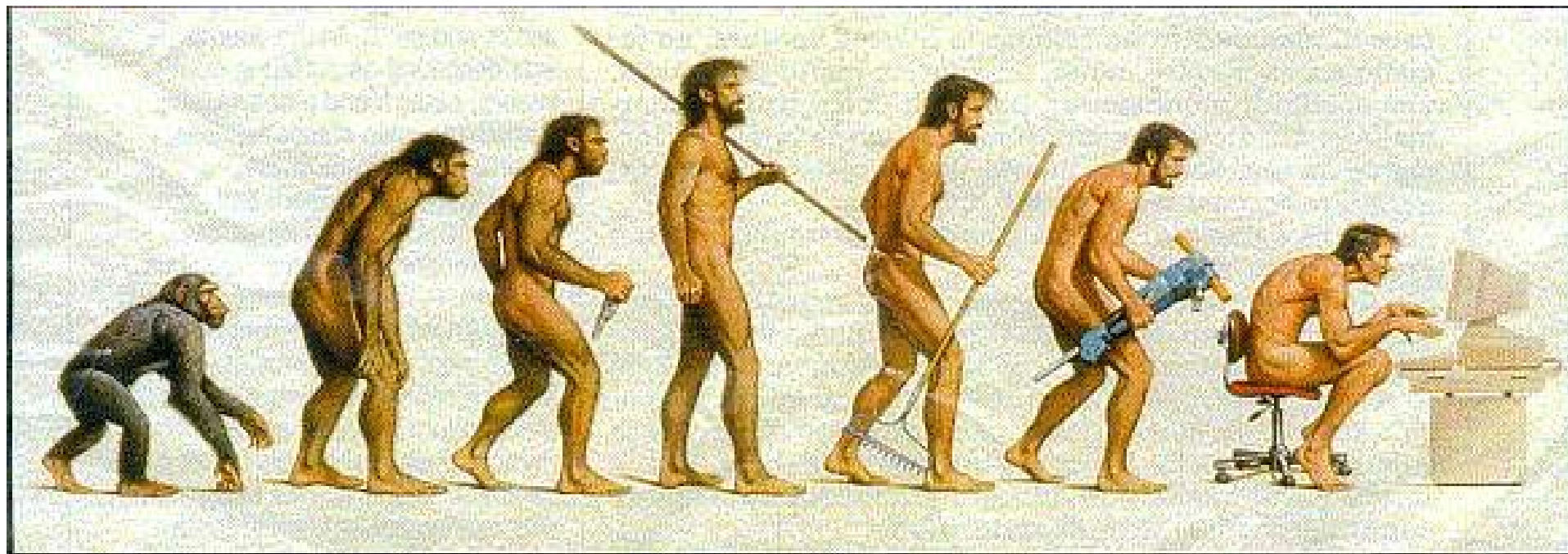


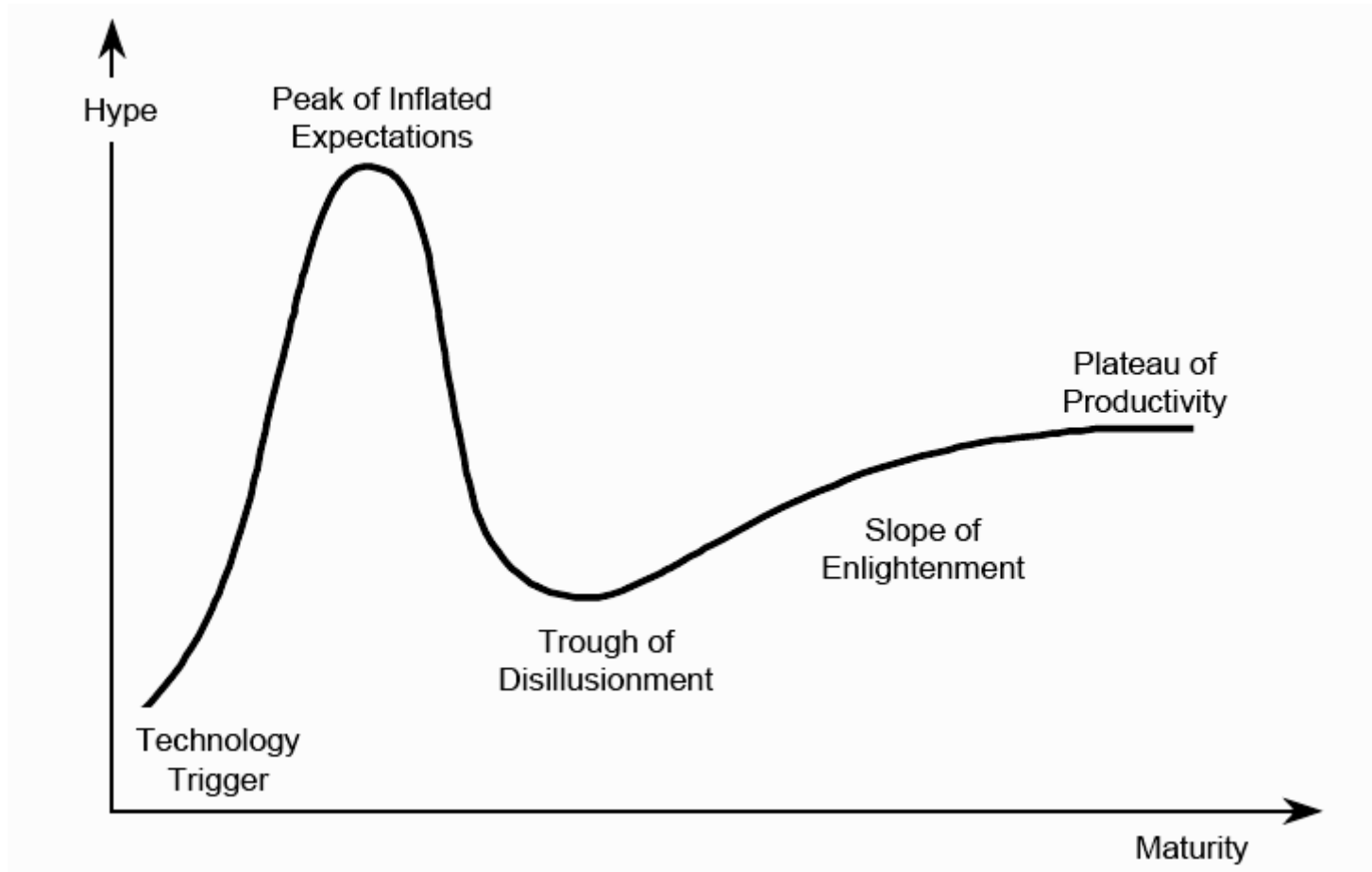
5. Technology Roadmap

2006

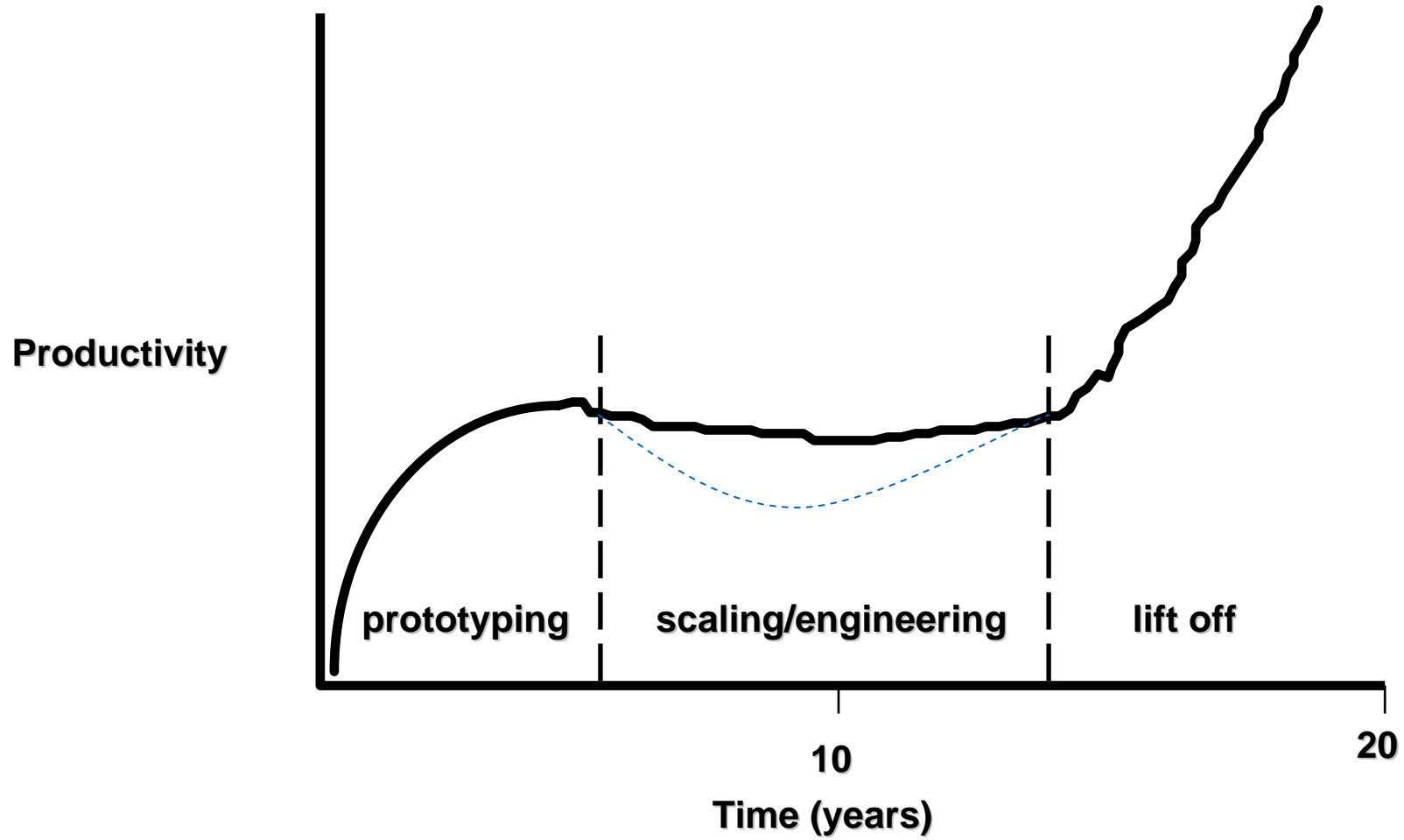
Tehnoloogiate **evolutsioon**



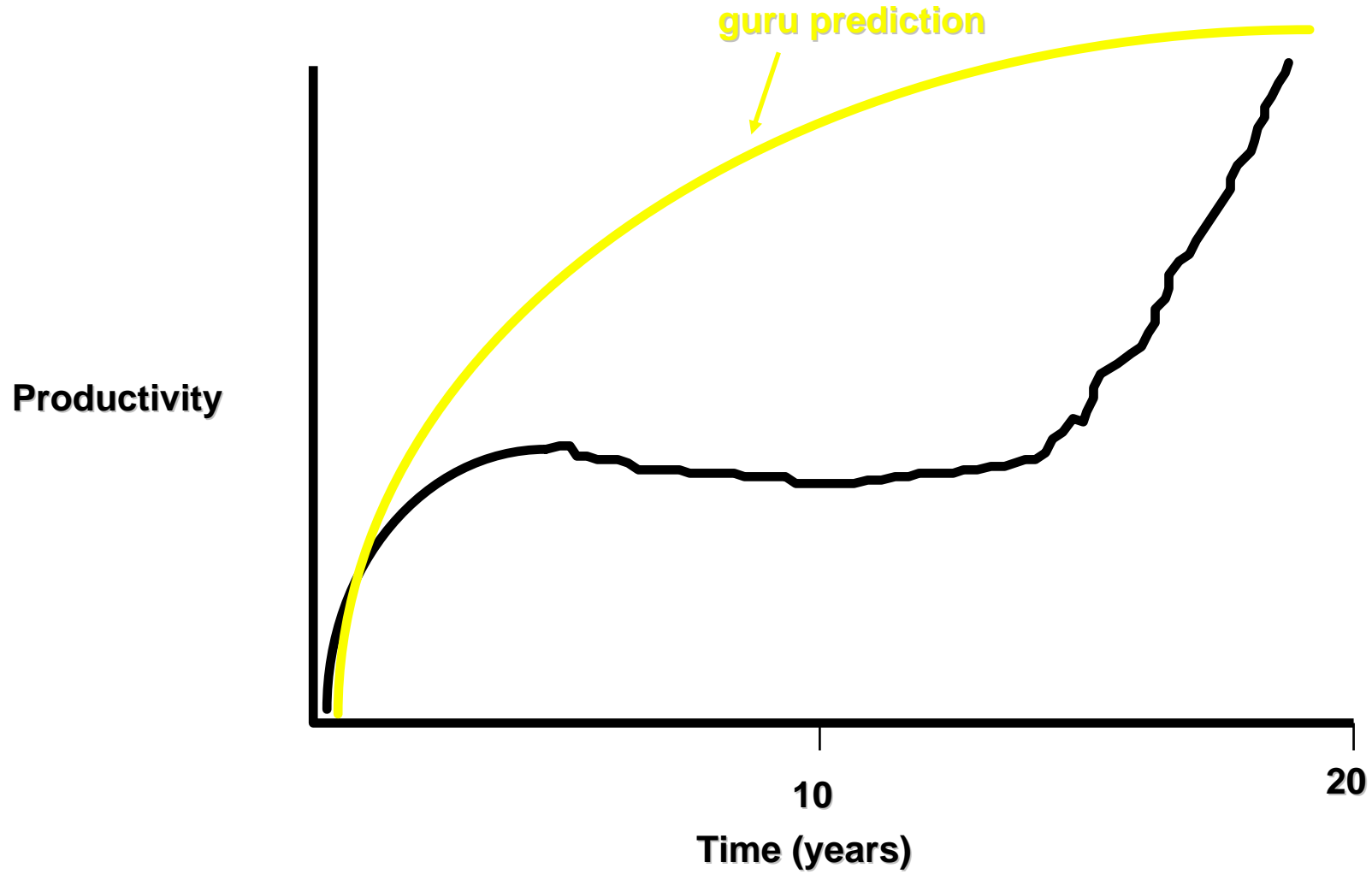
The Technology Hype Cycle



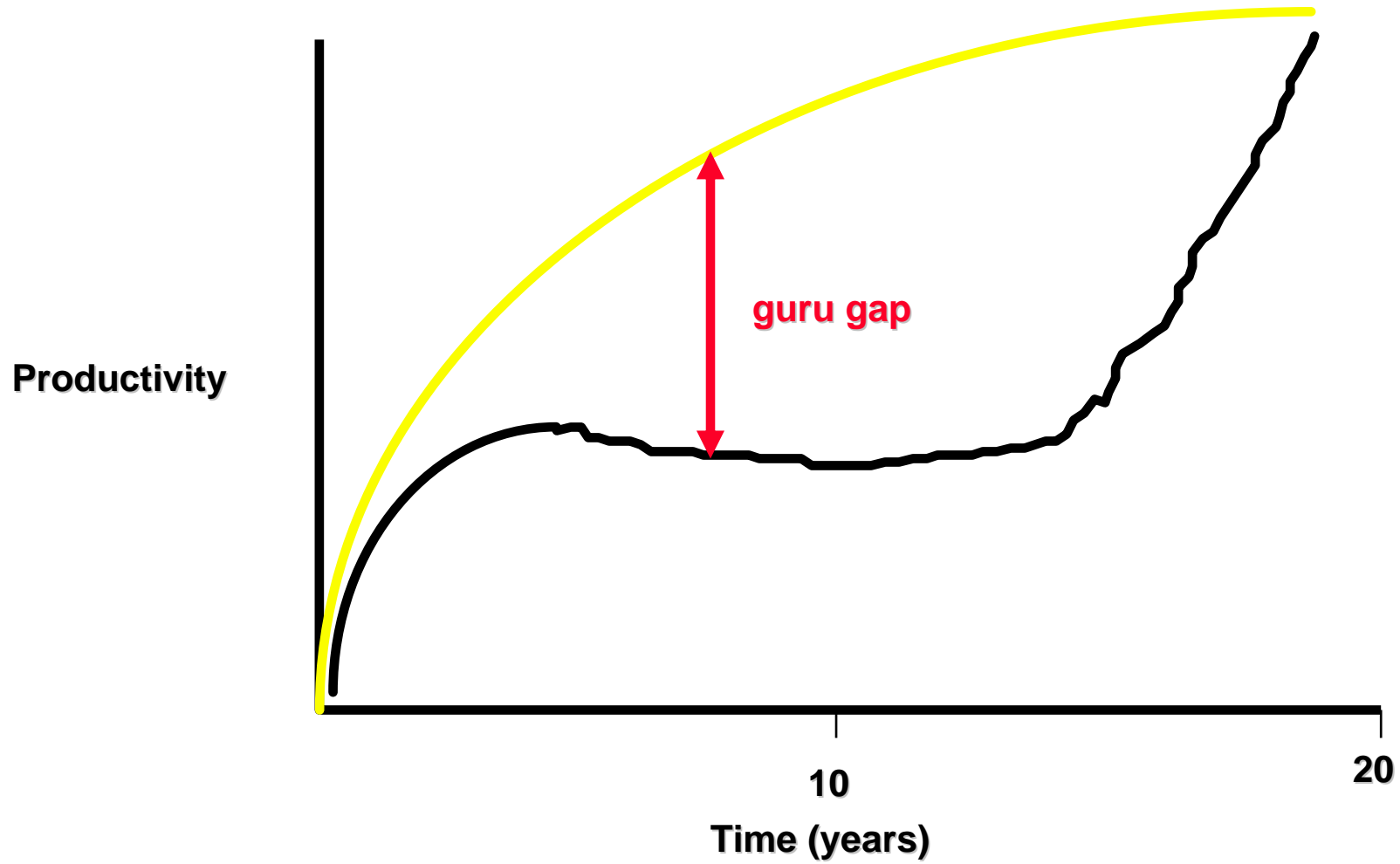
Technology Maturity



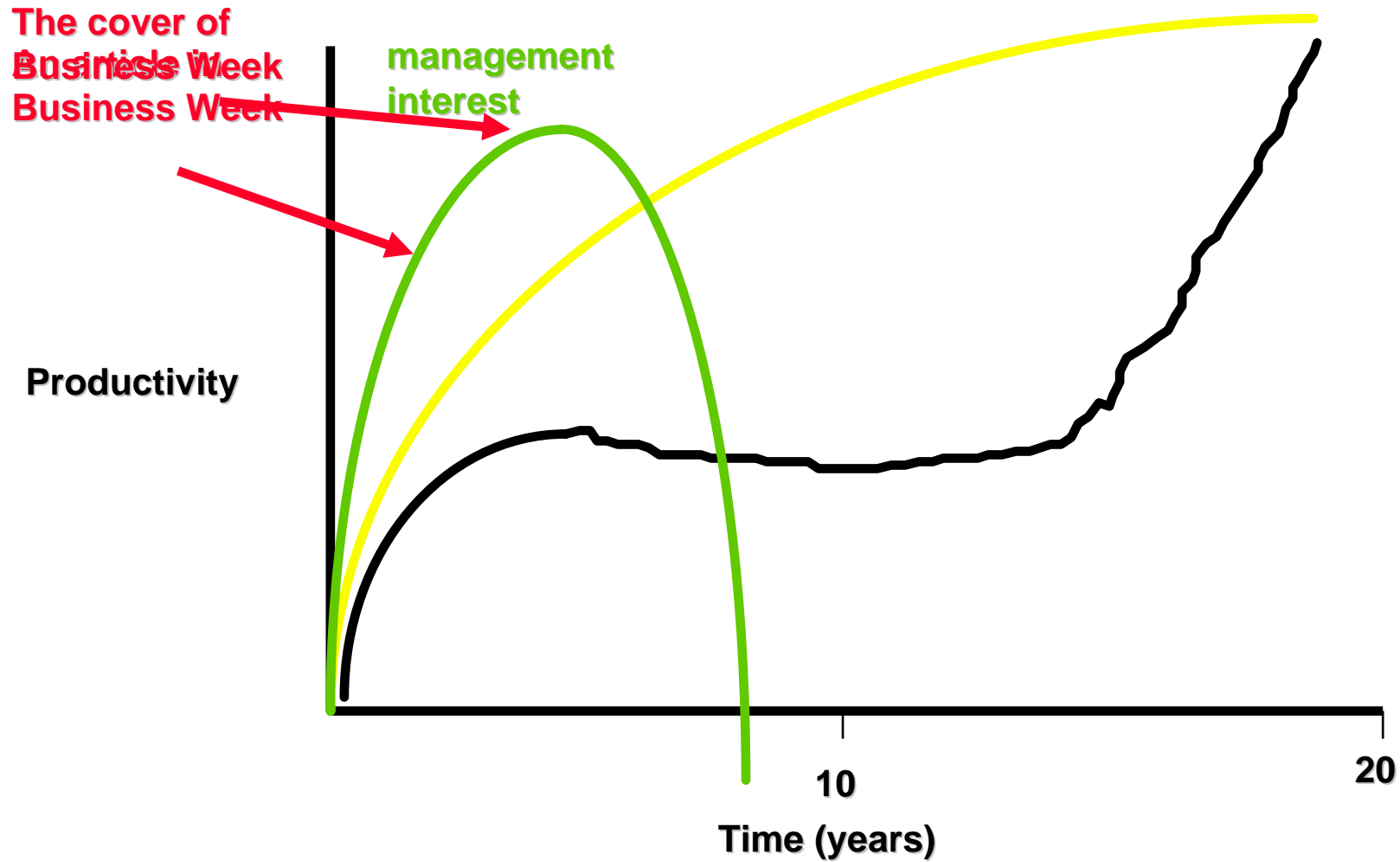
Technology Maturity



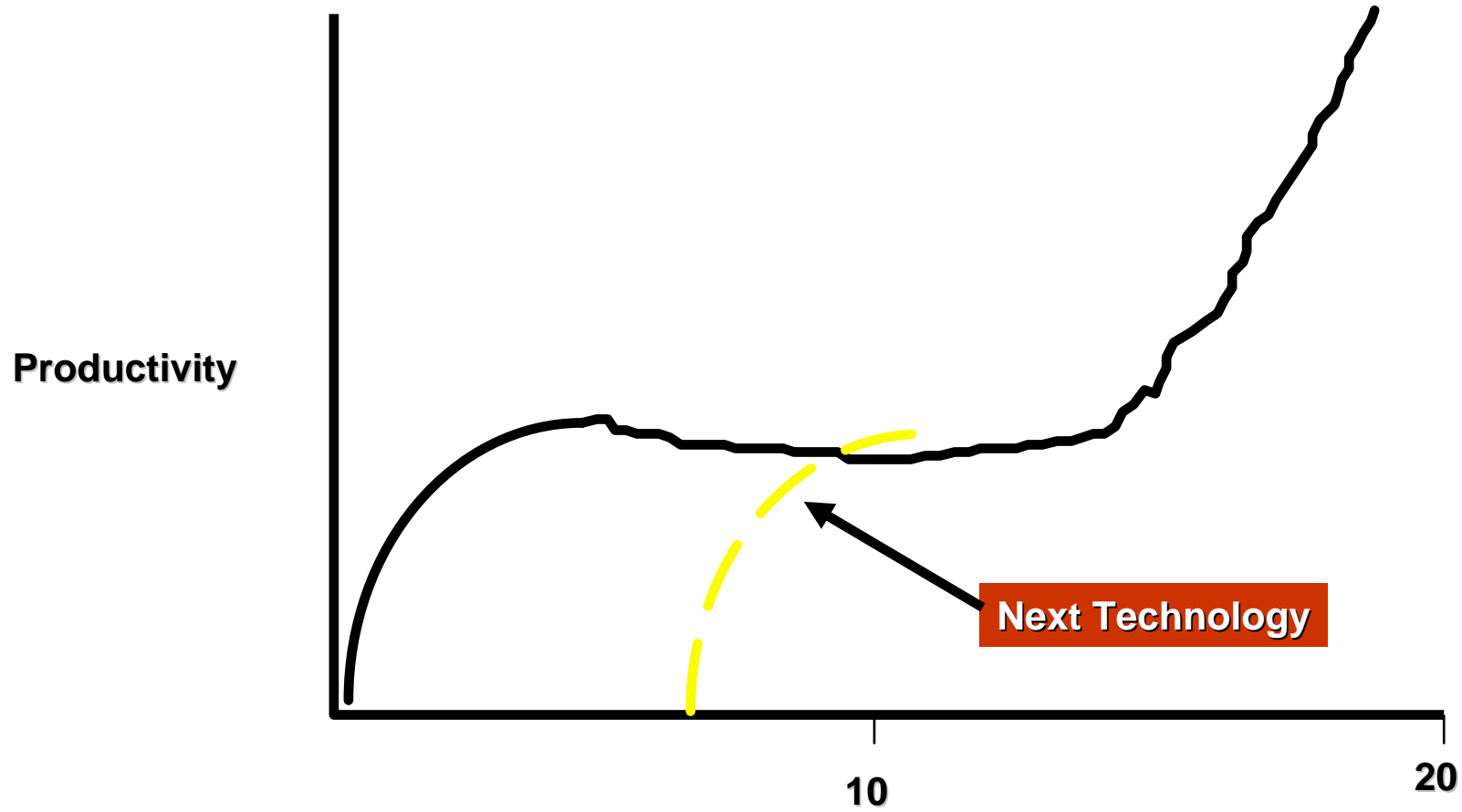
Technology Maturity



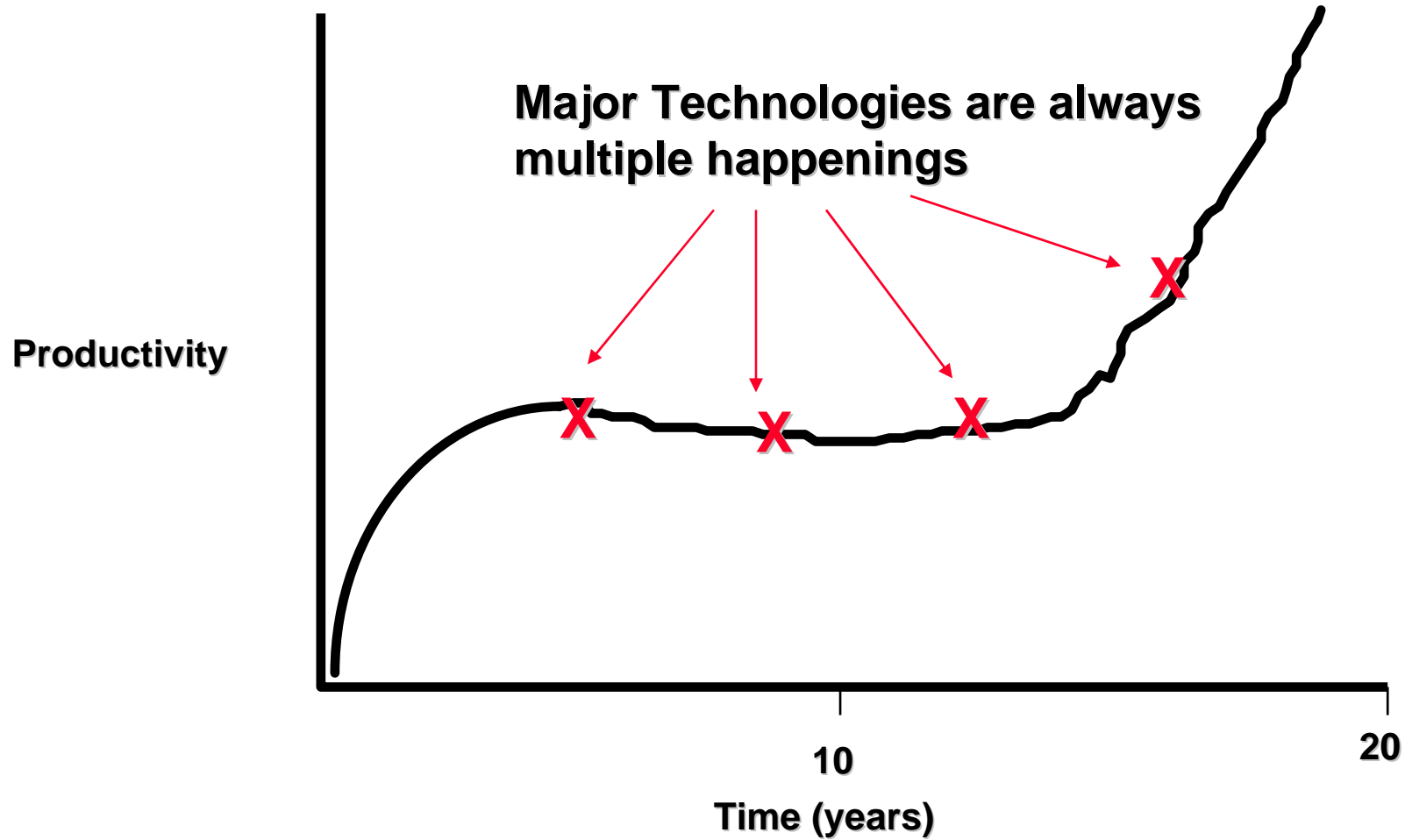
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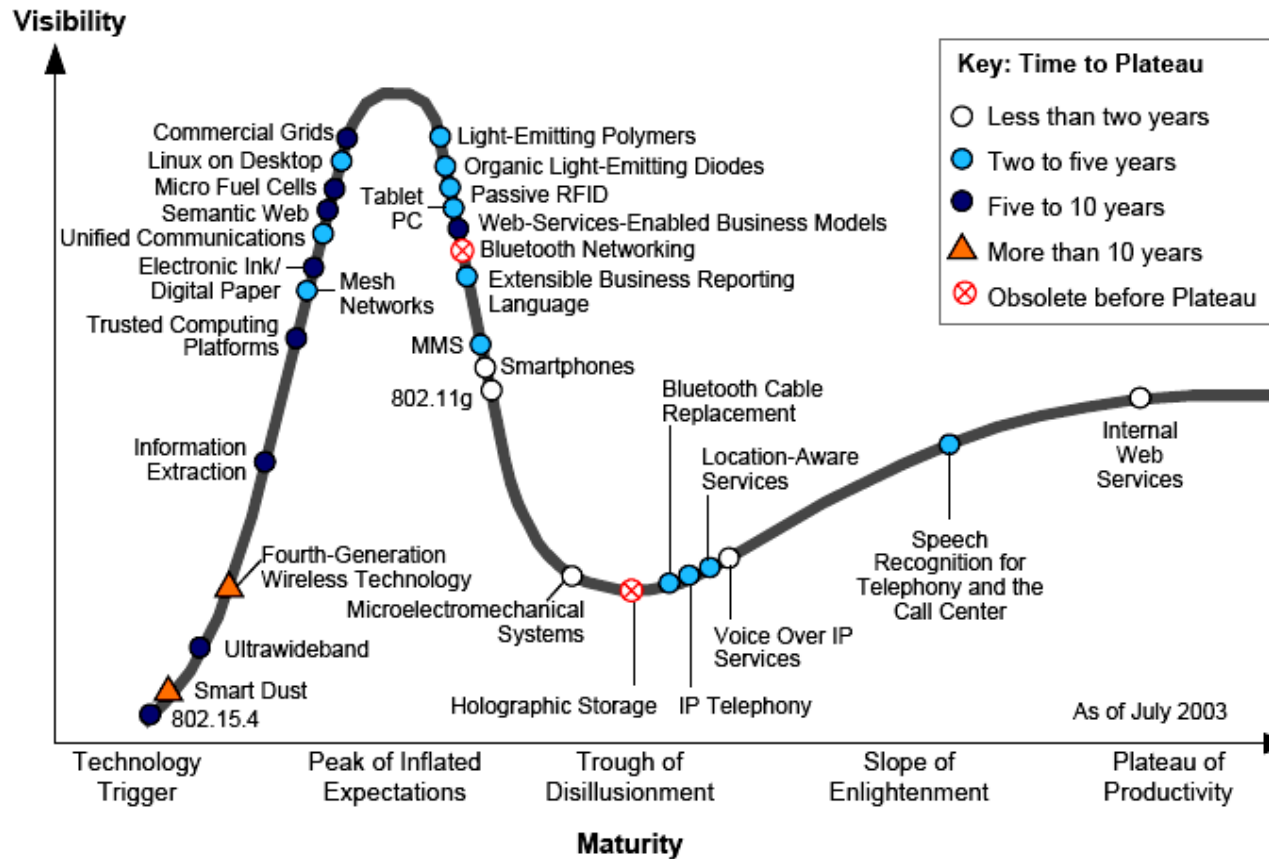
Technology Maturity



Technology Maturity

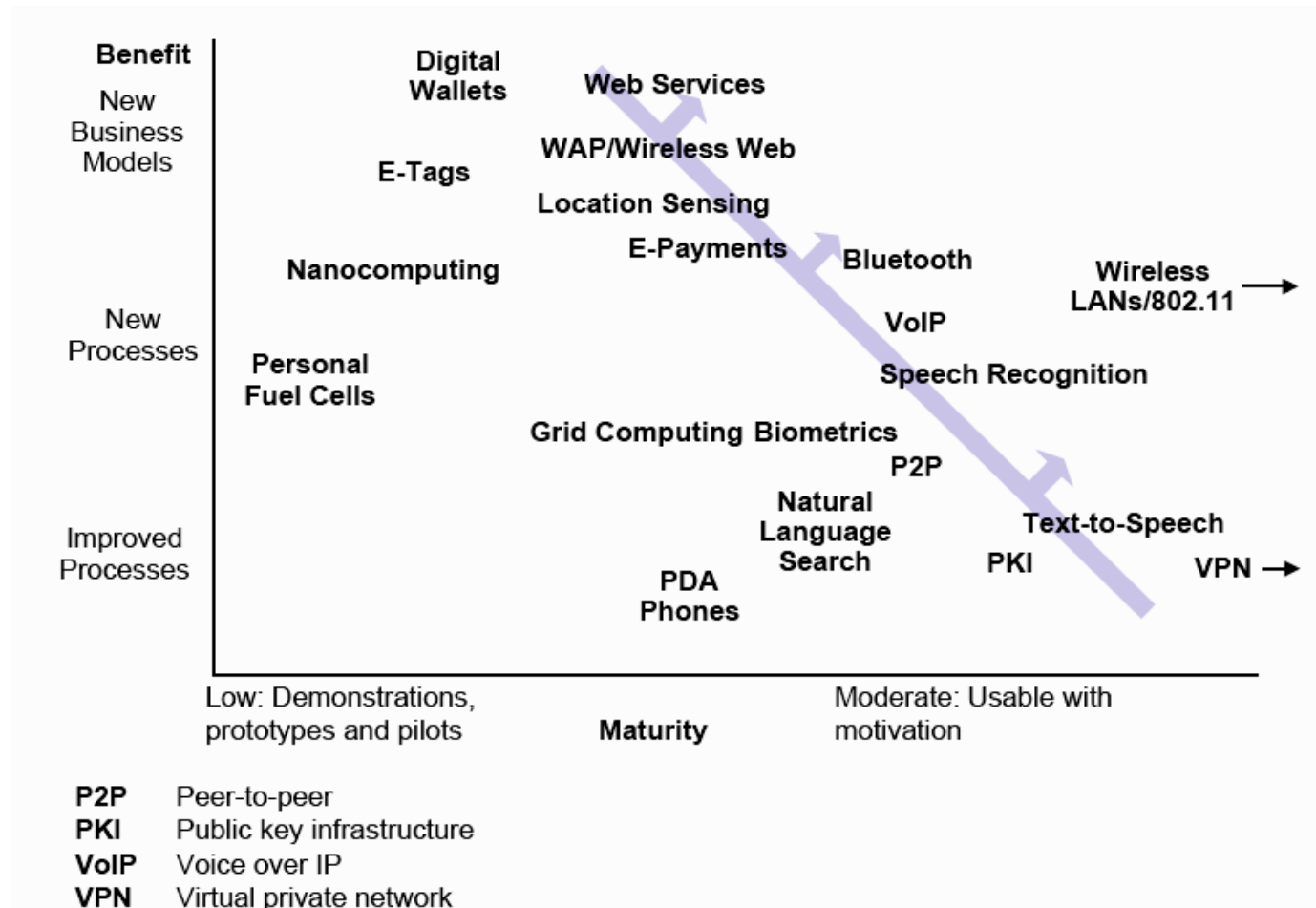


The Hype Cycle

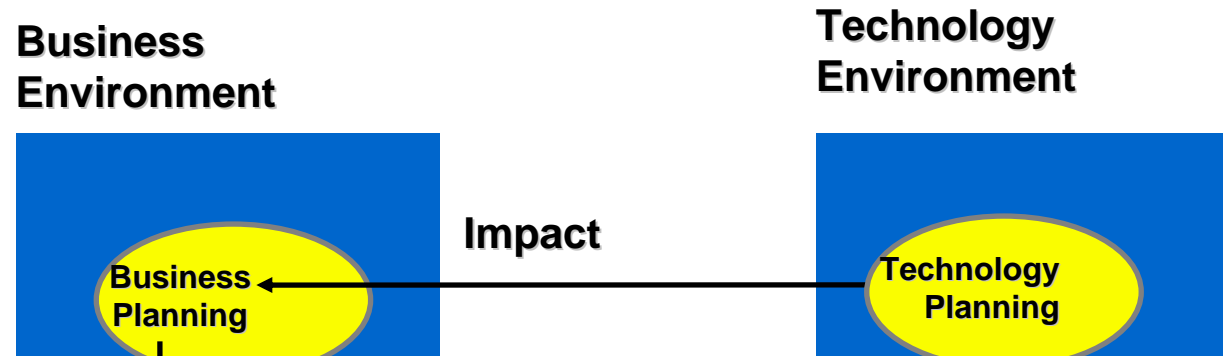


Source: Gartner Research (July 2003)

2002 Technology Radar Screen

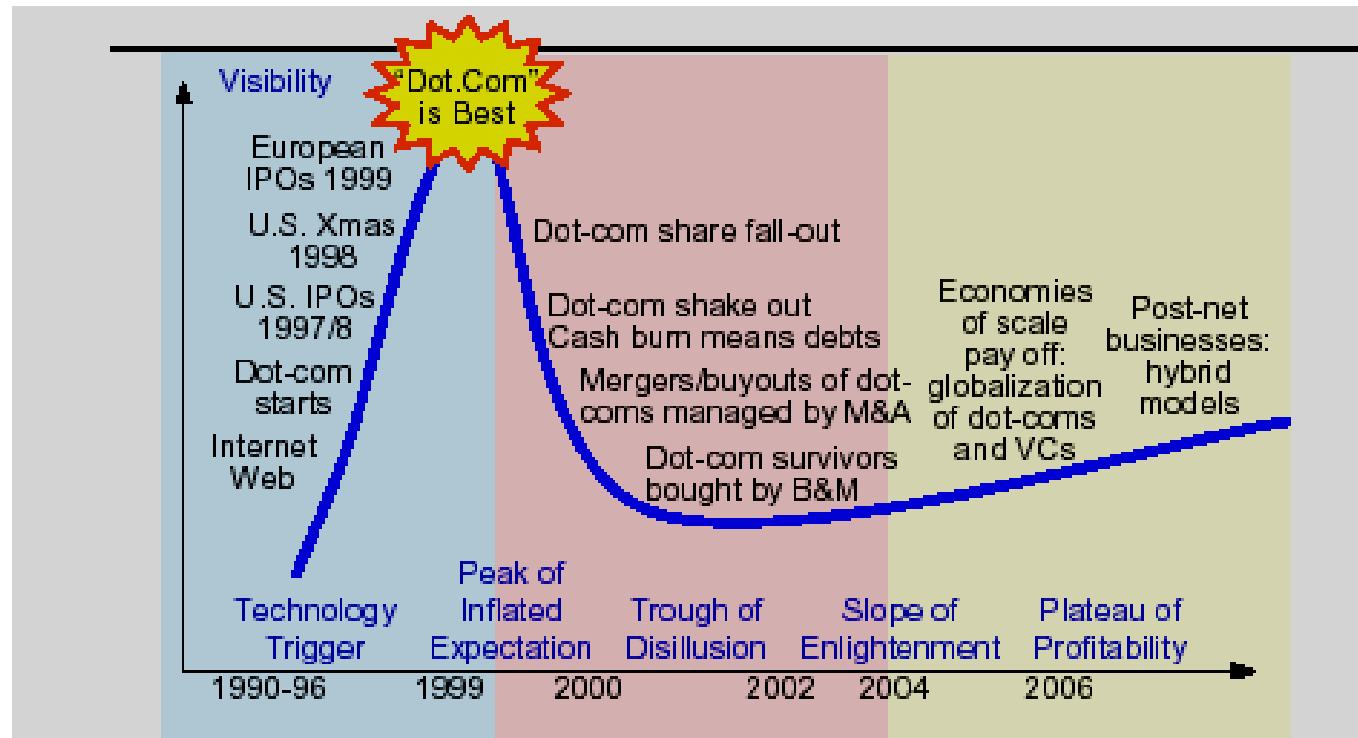


Benson & Parker's "Square Wheel"

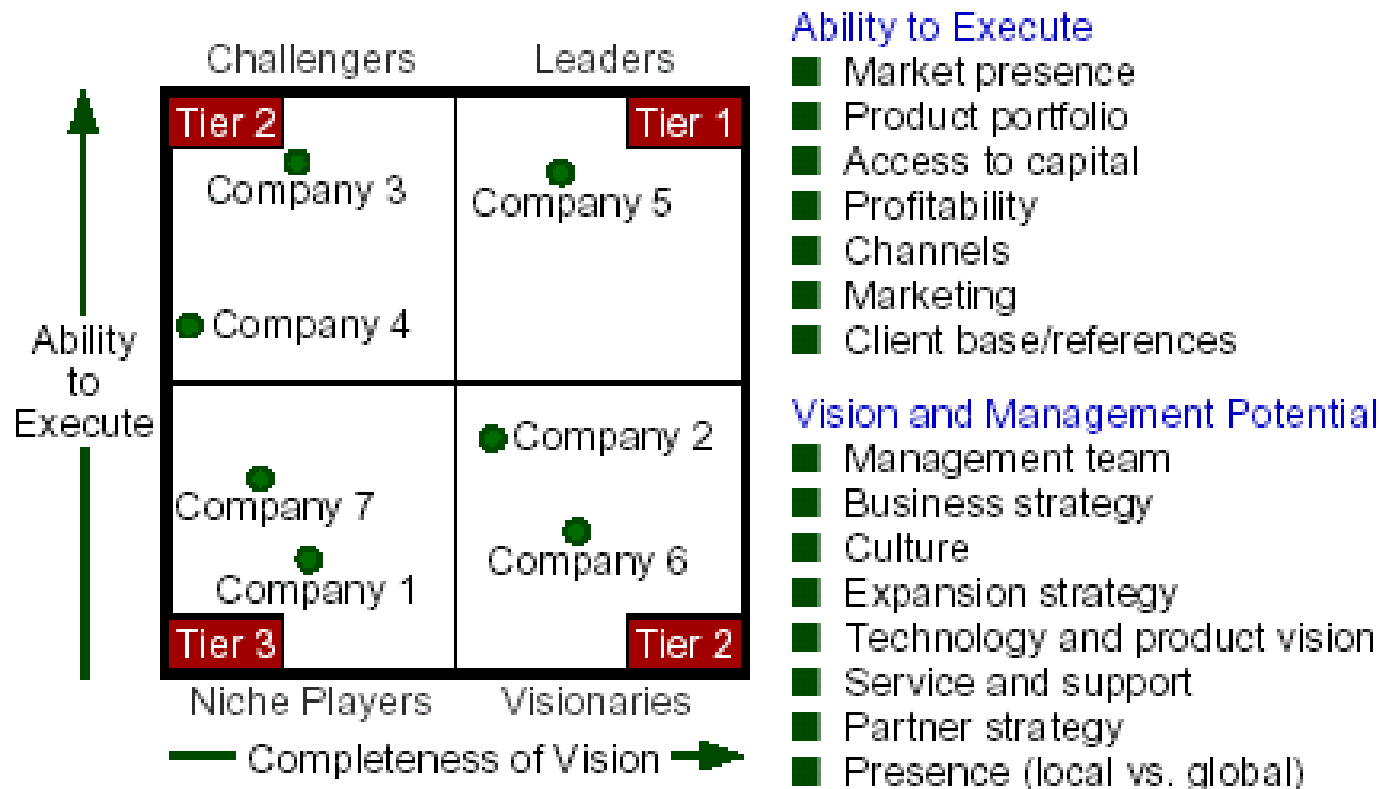


Information Technology has to do more than just align itself with the business, it has to help the business have the maximum impact in the marketplace.

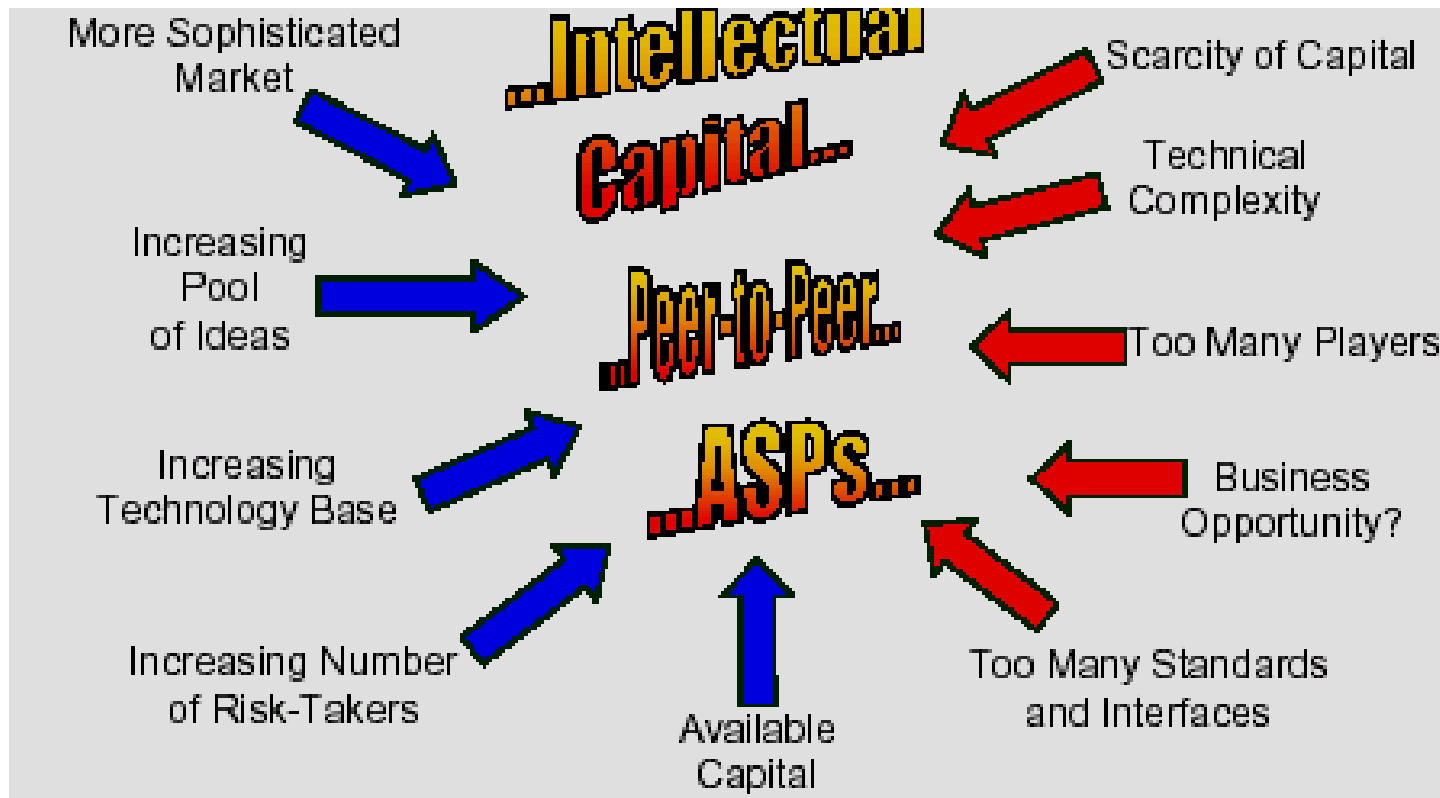
The Investor's Hype Cycle



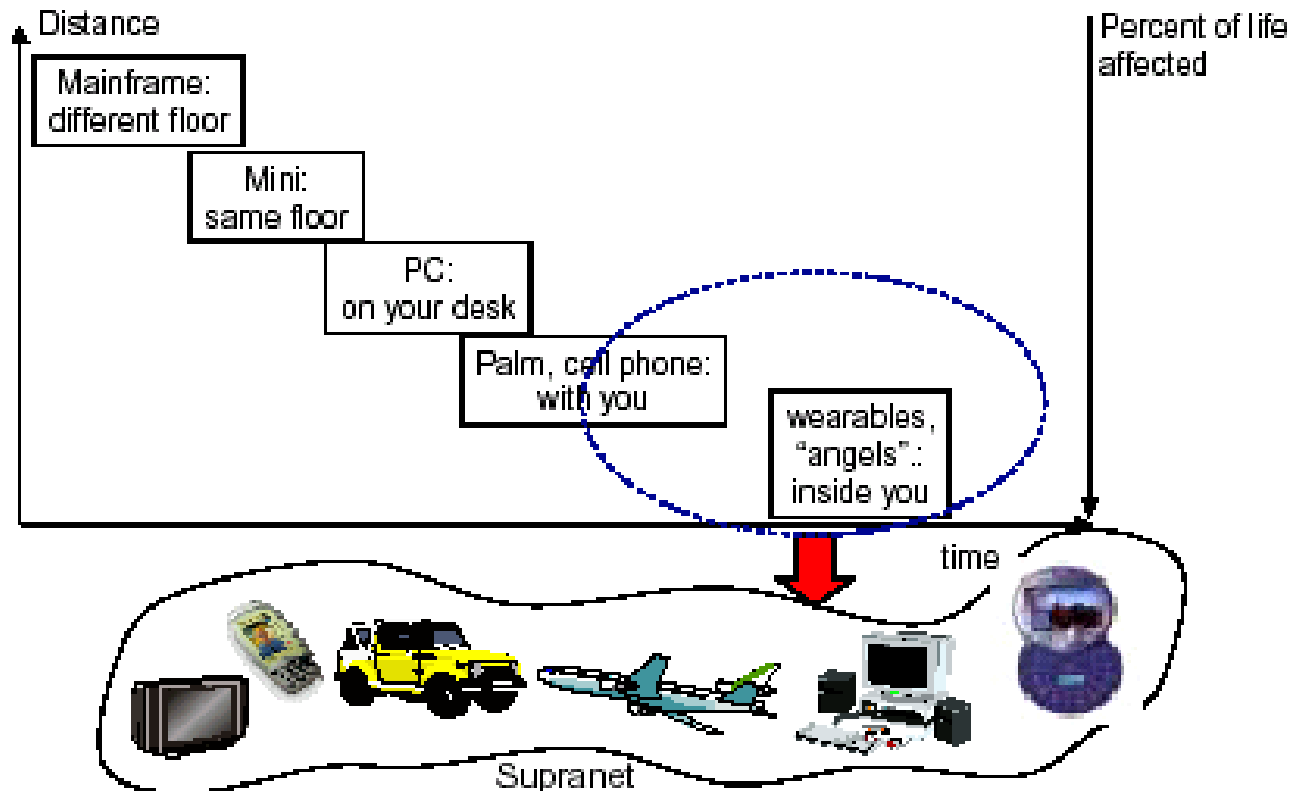
Positioning Opportunities



Is It Cool ... Or Overhyped ?

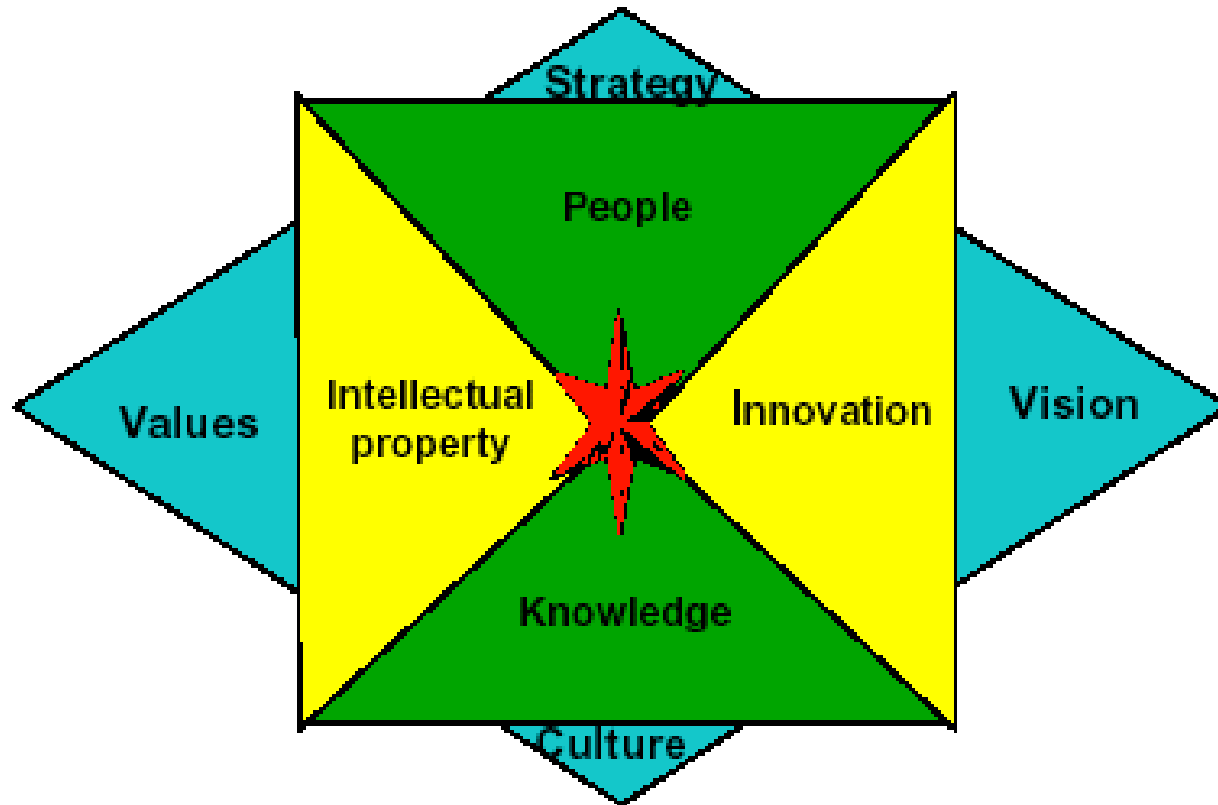


Next Paradigm, Please ...

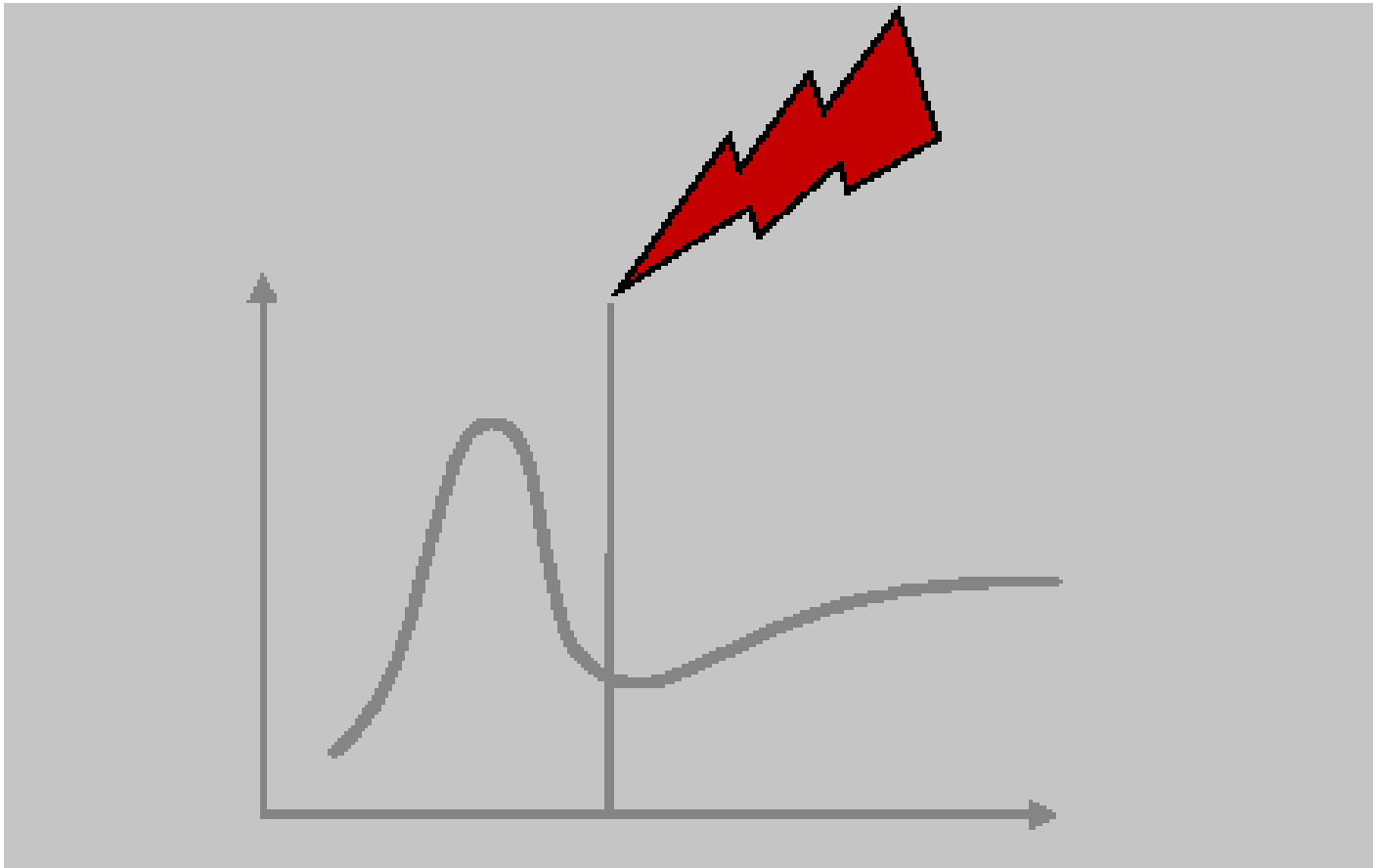


The "Supranet" is the merger of the physical world (the "p-world") and the electronic world (the "e-world").

Continuous innovation for competitive advantage

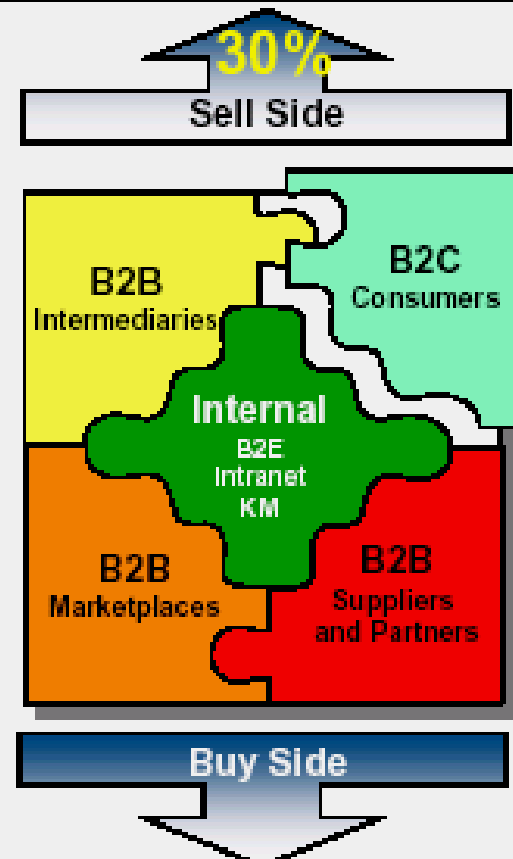


Dealing With the Uncertainty:

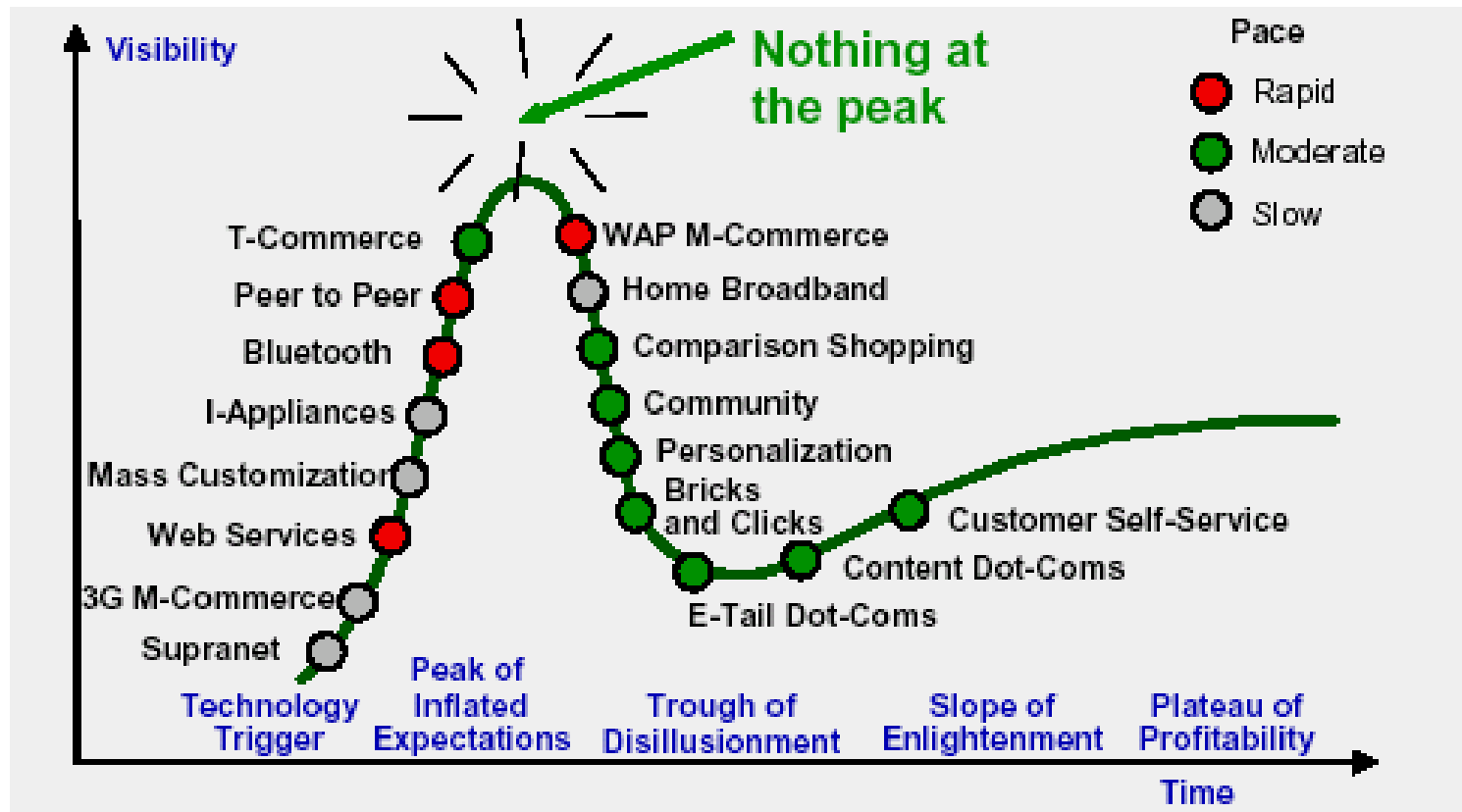


Tactics for the Tough Economy

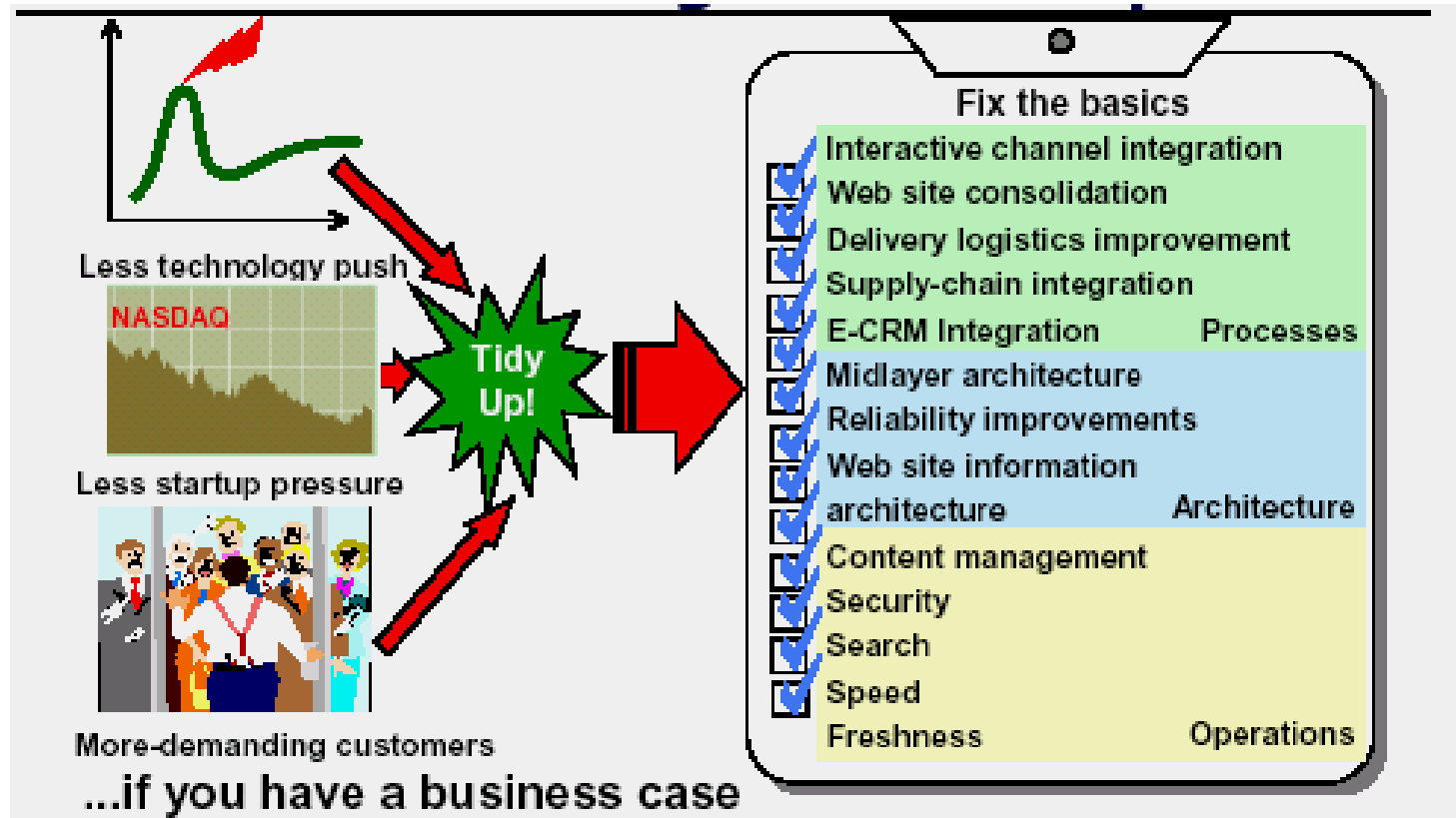
- Bloated e-business budgets are under scrutiny
- Corporate pressure to redirect B2C funds to business-to-business (B2B) and cost saving areas
- B2C will emerge from the trough of disillusionment during 2002 or 2003
- Hold 30 percent of budget to the sell side (to emerge ready)
- Tactically, prioritize customer retention projects



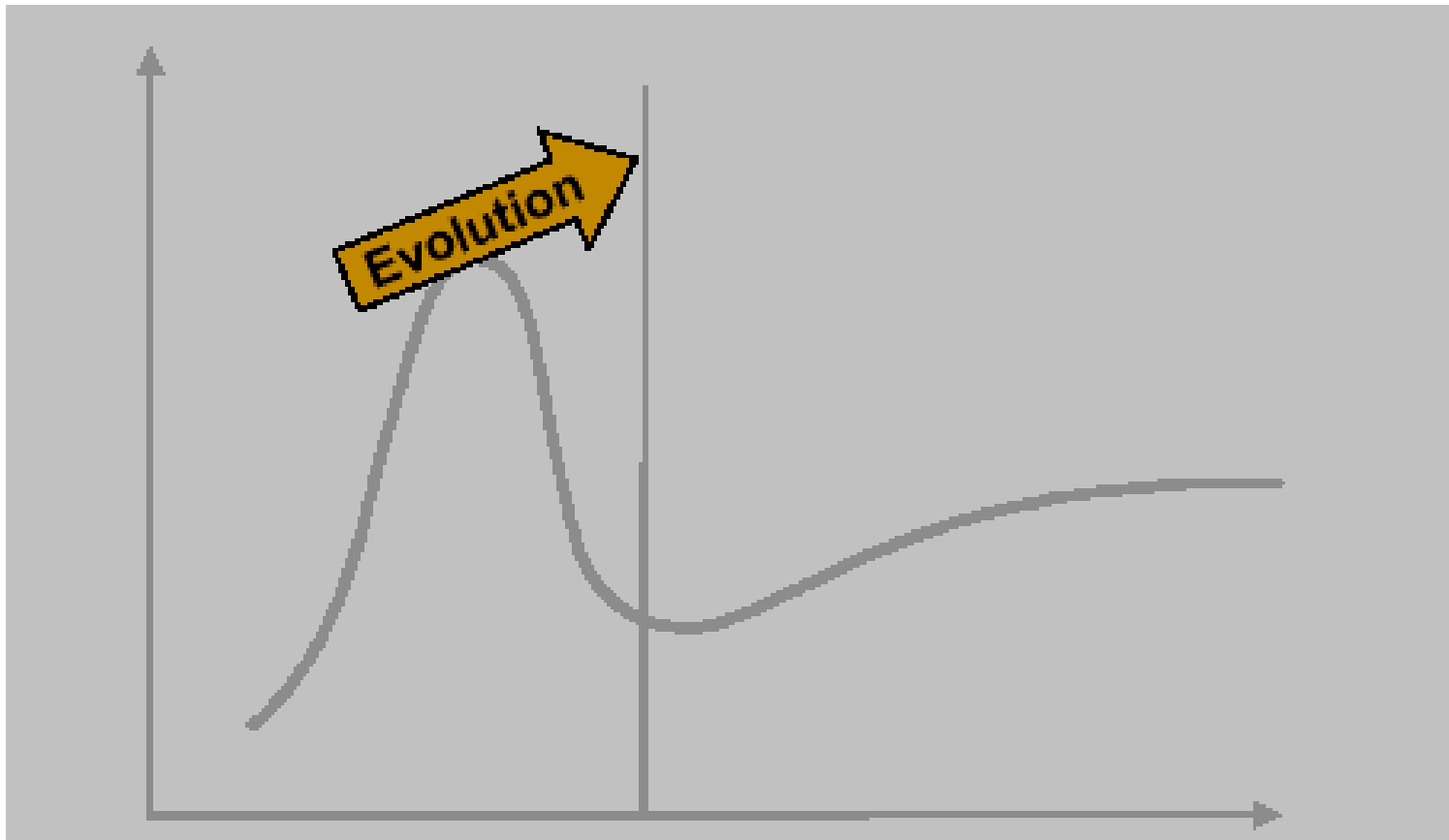
European B2C Hype Cycle 2002



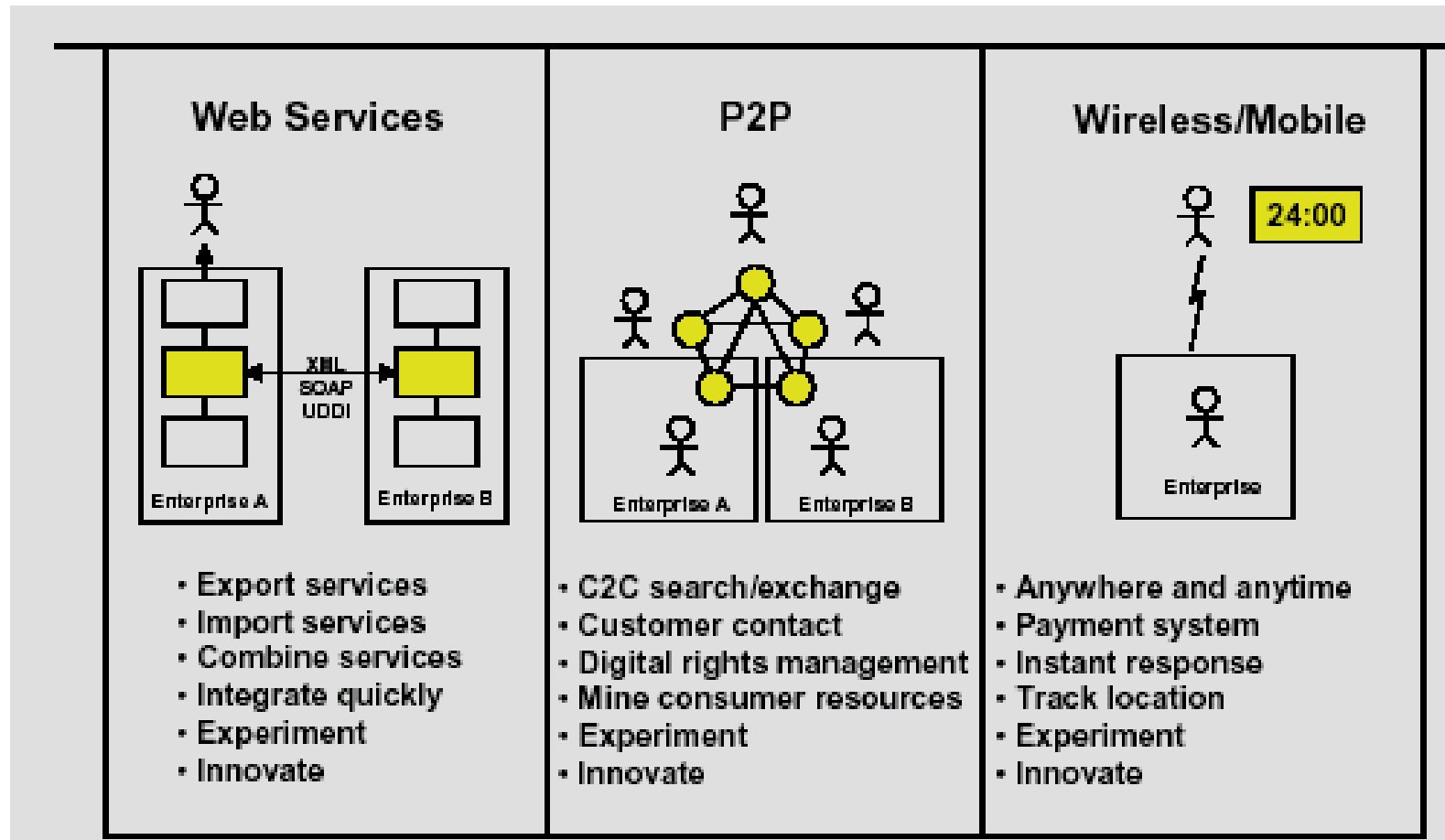
2002: Take Advantage of the Gap Year



B2C Renaissance (2003 to 2005)



The Important Technologies



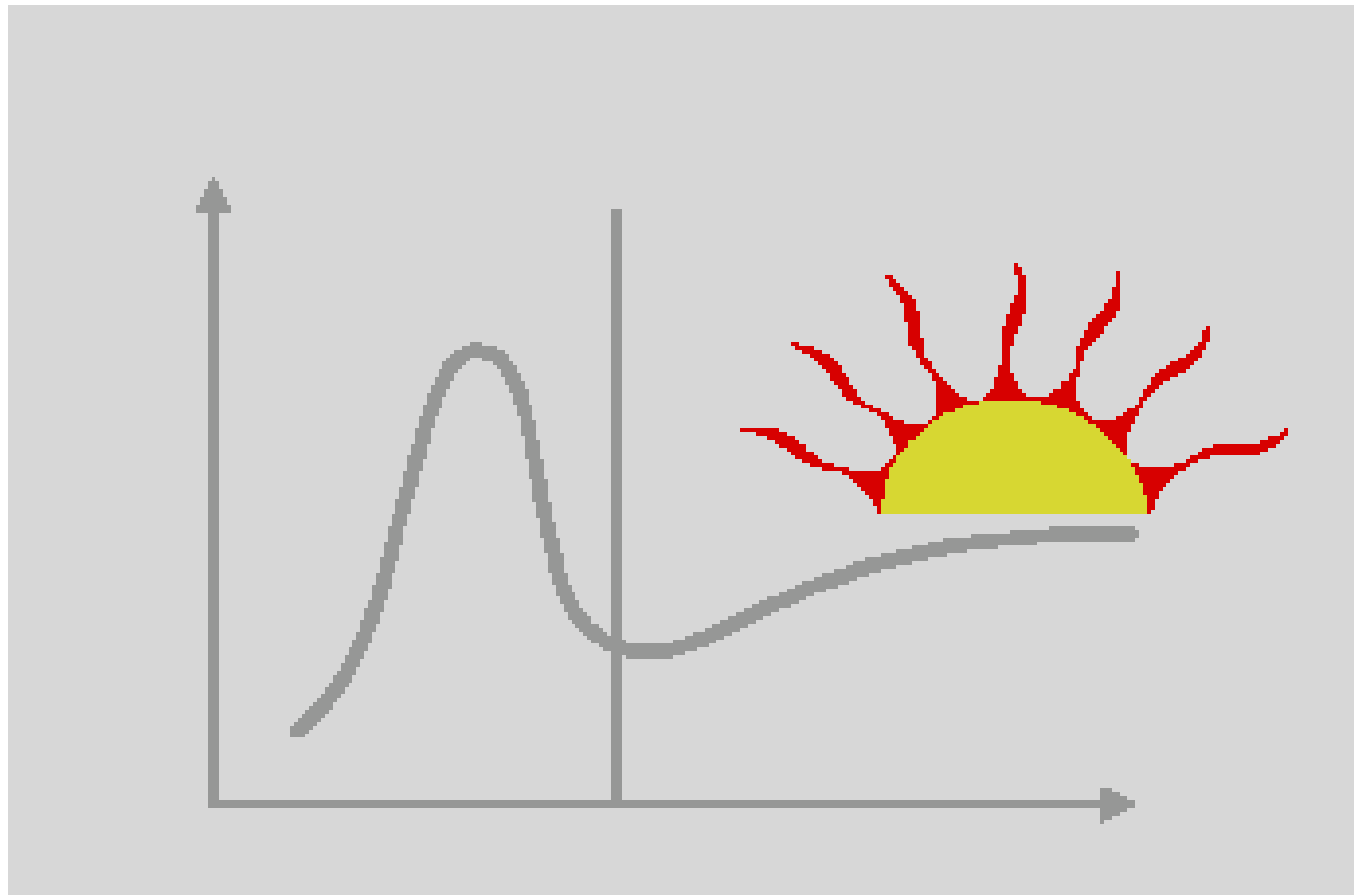
Resist Pressure From the 'New Gadgetocracy'

Focus on the basics:

- Who are your customers?
- What are their requirements?
 - What services to offer?
- Which contexts matter most?
 - Which channels to use?
(For best economic effect)

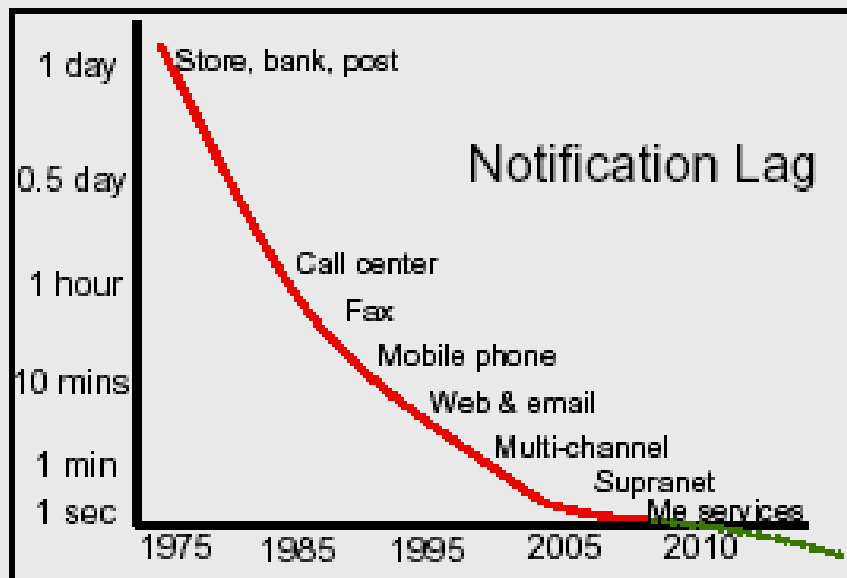


A Net-Liberated Destiny (2005 Onward)



The Frontline Battle Is for Resolution at the Point of Need

- Consumers want ease, convenience, immediacy
- Marketing overload confuses and irritates
- Technology gets closer to the point of origin
- From 2005 on, the battle for a customer will be measured in seconds.



Fully Net-Liberated Enterprises

Capability

Targeted context

Instant on Device

Always on Comms

Personalization, CRM

Customization

Low-latency internal business process

Web service, B2B virtualization

Digital distribution or
Supranet tracked logistics

Value

Address point of need

Impulse capture

Immediacy

Ease, comfort, familiarity

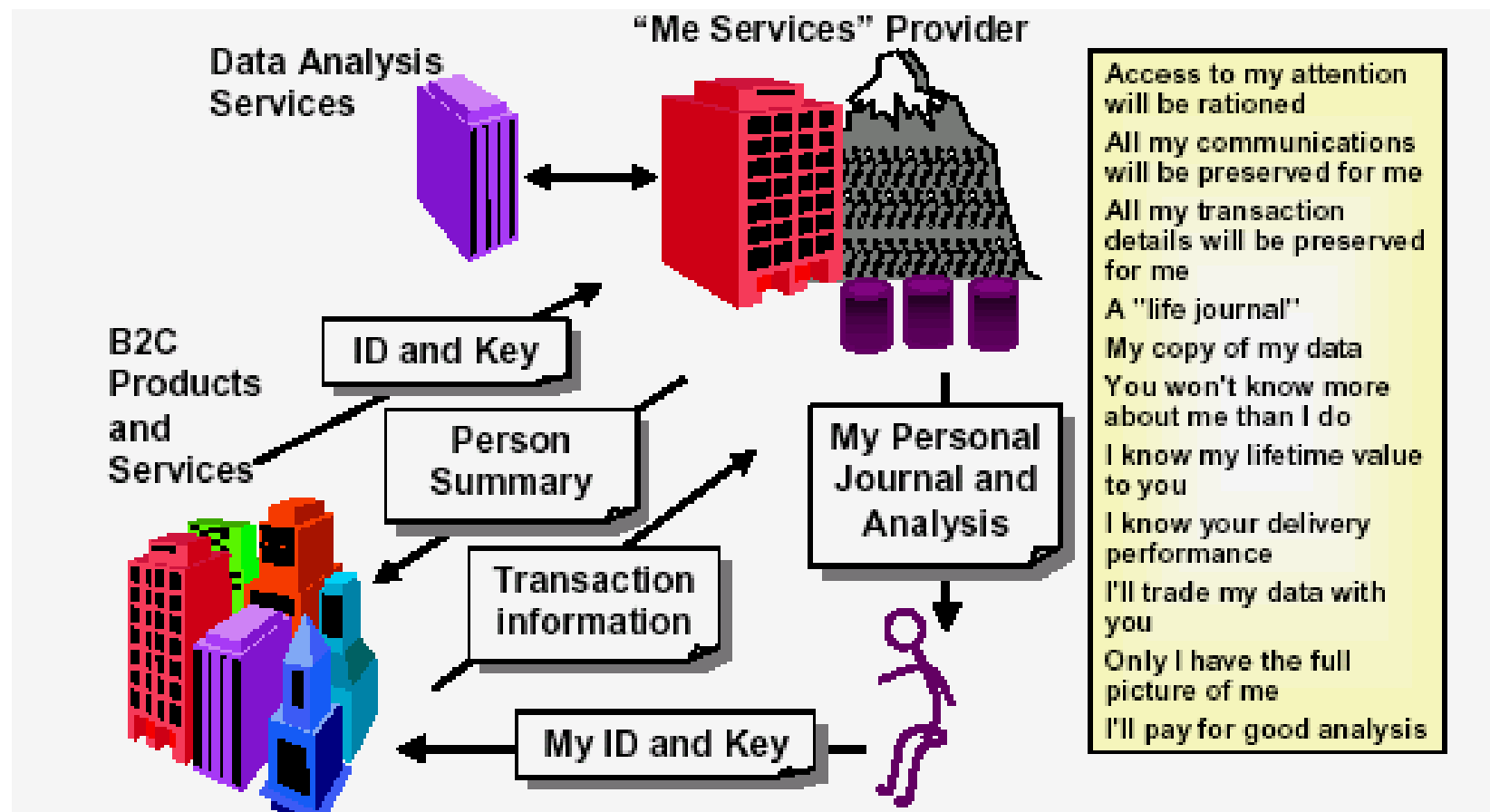
Meet the specific requirement

Quick response

Best in class

Fast, assured delivery

'Me' Services



Conclusions

Dealing with uncertainty in 2002

- Do not stop investing in B2C
- Economic conditions create a "gap year" opportunity
- Pragmatists will switch quickly from from "new rules" to new realities

European B2C renaissance (2002 to 2005)

- Leaders will fuse new disciplines with disruptive technologies
- Business to consumer (B2C) interactive channels will proliferate

Net-liberated destiny (2005 onward)

- Competition for the consumer will be measured in seconds
- Consumer "me services" will reward genuine relationship builders

2010: The Vision

