



Digital Matters?

Yes, it does – Yes, we can!

8 March 2018

Embracing technology
Embracing ambition

.AGORIA

Organisation of technology inspired companies in Belgium

1,800

Member companies
in **6** industries

Aeronautics, Space, Security & Defence industries

Building, Contracting & Technical Services industries

Digital industries

Manufacturing industries

Materials industries

Telecom industries

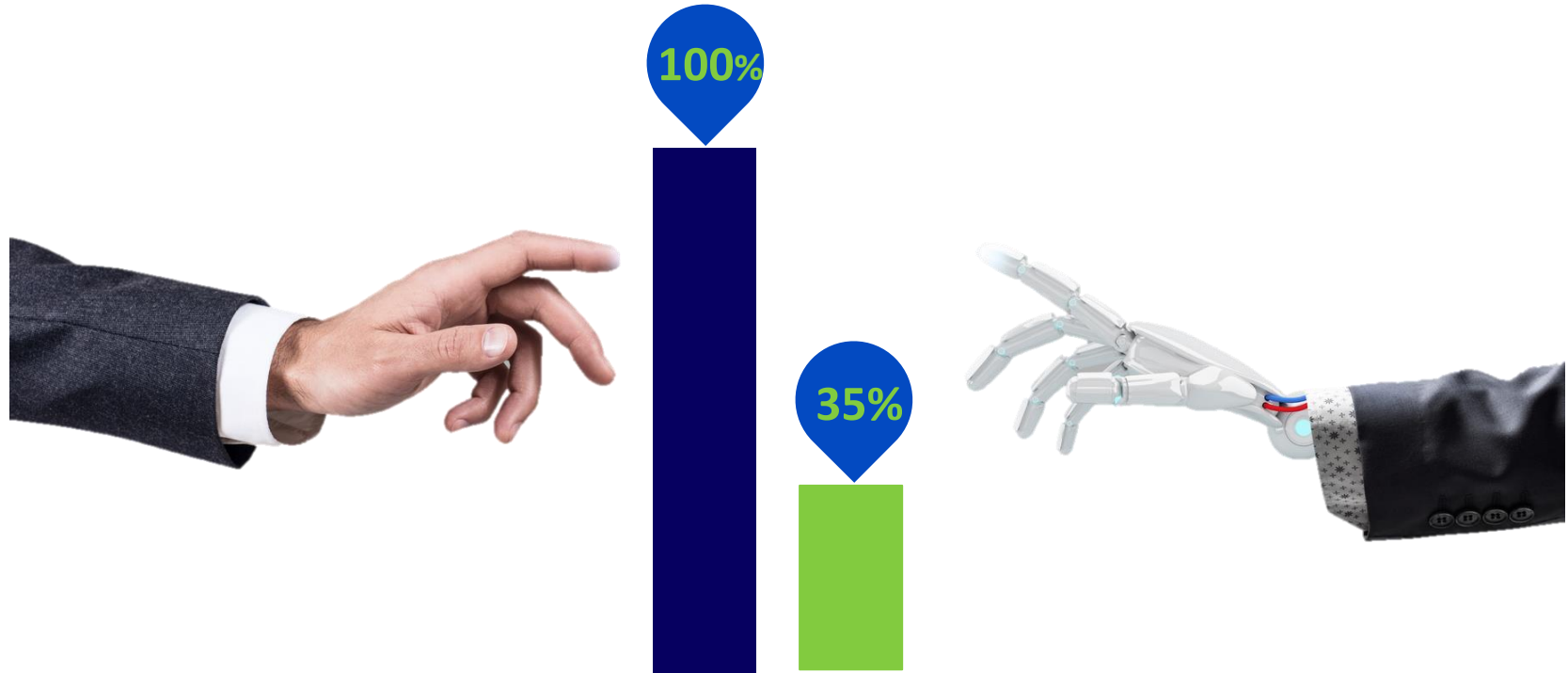


The journey to the digital society

1 DIGITAL?



How digitized is the business world today?



Digital consumption continues to grow exponentially...



Device ownership by Belgian households, 2017



78%

HAS A SMARTPHONE
Twice as many as in
2012



60%

HAS A TABLET
Twice as many
as in 2012



32%

HAS GAME CONSOLE
15% owns a handheld
game console



83%

HAS DIGITAL TV
31% has PayTV



19%

WEARABLES
Increased from
7% in 2015

- **1 IN 3 FAMILIES HAS AT LEAST 4 SMART DEVICES**
- **MOBILE DATA DOUBLES ALMOST EVERY 12 MONTHS**
- **WEARABLES IS A NEW TREND DRIVEN BY SPORTS & FITNESS APPLICATIONS**

Value migrates to digital...

530 K



b\$ 555

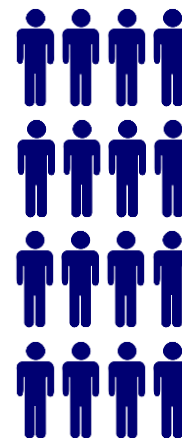
Turnover 2016



b\$ 466

GDP 2016

11 Mio



Value migrates to digital...

530 K



b\$ 3660

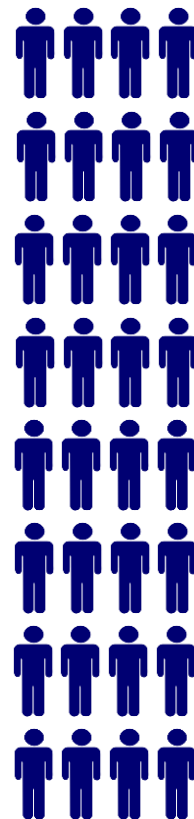
Market valuation Jan 2018



b\$ 3660

Est. GDP 2017

83 Mio





...rush to become more digital

IOT

AR/VR

BIG DATA

SOCIAL MEDIA

3D PRINTING

DRONES

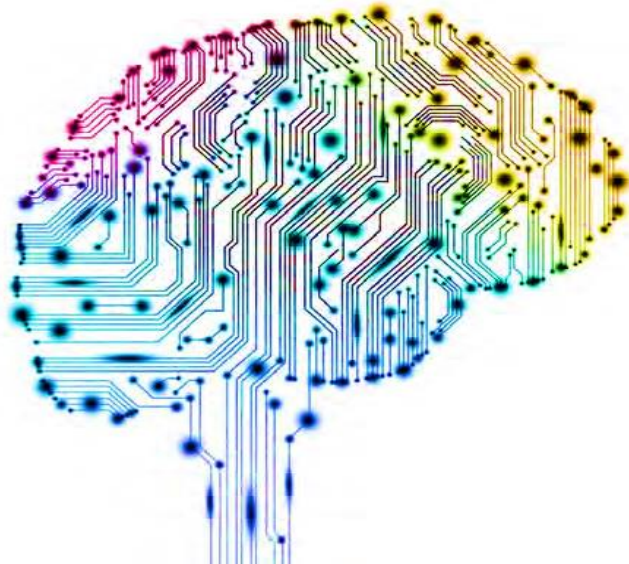
SMART ROBOTS

BLOCKCHAIN

What is digital?



What can digital technology really do?



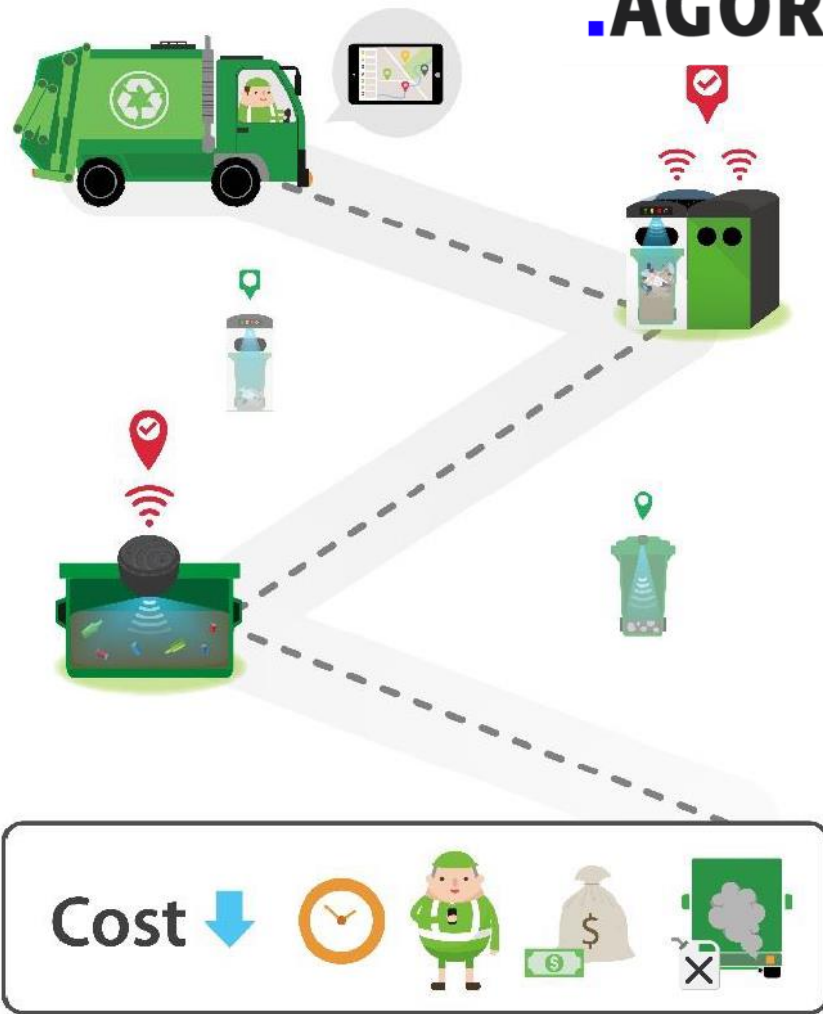
- **DEMATERIALIZIZE**
- **OBSERVE**
- **PREDICT**
- **CONNECT**
- **MATERIALIZE**



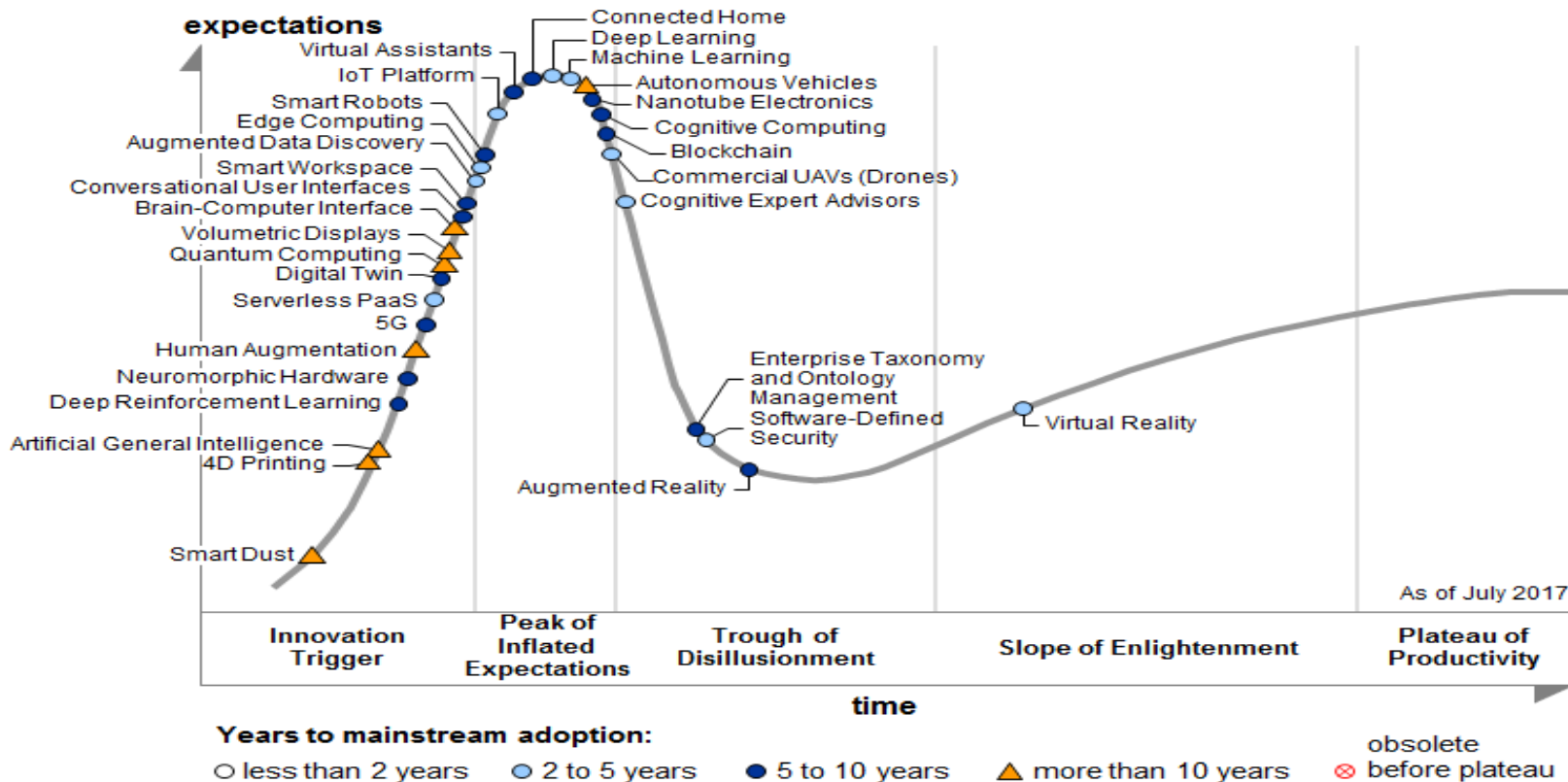
WASHINGTON
DC

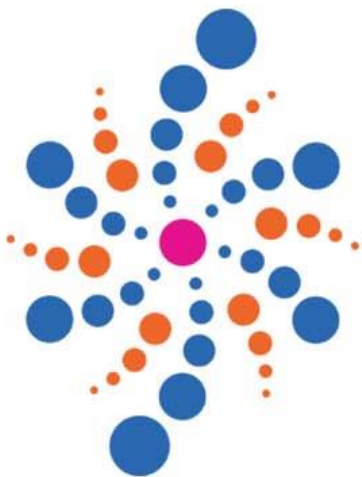


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Gartner: Hype cycles emerging trends, 2017





Singular

U N I V E R S I T Y

**DIGITAL
CAPABILITIES**

DEMATERIALIZE

OBSERVE

PREDICT

CONNECT

MATERIALIZE

DIGITALIZATION

**5 DISRUPTIVE
FORCES**

digital technology
enables...

DIGITAL AUTOMATION



ZERO MARGINAL COST

Scale without mass

BARNES & NOBLE
BOOKSELLERS

€ € € € €



amazon

.be .de .au
.fr .co.uk .ca
.com .cn

CUSTOMISATION IS NOT SCALABLE?



DR
M CO
Y. C.

EMERGING TECH

Future of Retail? Nike's Cool New Toy Lets You Design and Print Custom Sneakers in an Hour

W+K's The Lodge experiments with AR, object tracking and projection

By Tim Nudd | September 6, 2017



MANUFACTURERS SELL PRODUCTS, NOT THEIR USAGE?

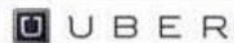


Source: Ng, 2014

ZERO TRANSACTION COSTS

Platforms & Horizontal Coordination





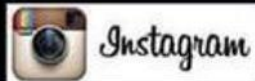
The world's largest taxi company owns no vehicles



The largest accommodation provider owns no real estate



The most popular media provider creates no content



The most valuable photo company sells no cameras



The fastest growing television network lays no cables



The most valuable retailer has no inventory

DIGITAL
CAPABILITIES

DISRUPTIVE
FORCES

DEMATERIALIZER

OBSERVE

PREDICT

CONNECT

MATERIALIZER

DIGITALIZATION

- DIGITAL AUTOMATION
- ZERO MARGINAL COSTS
Scale without capital
- MASS-CUSTOMISATION
- SERVICIZATION
- ZERO TRANSACTION COSTS

Digital success requires strategy change + technology investment



2 DIGITAL 'HEALTH'



Digital Healthcare – different from other industries?



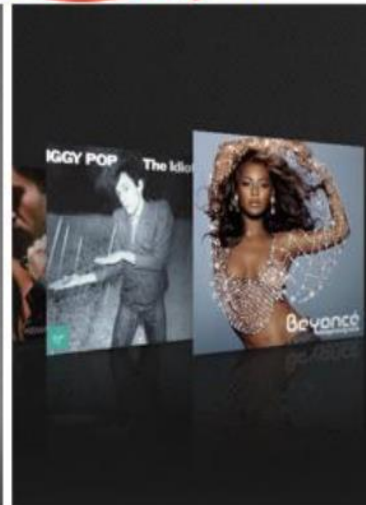
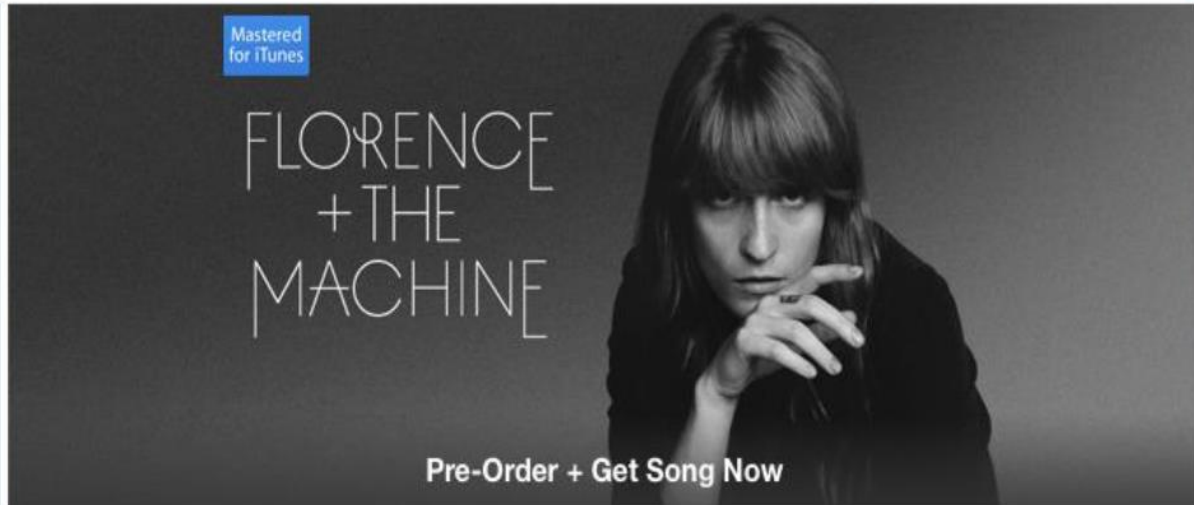


Search Store



My Music Playlists Match iTunes Store

Sign in



New & Noteworthy

Albums Singles + EPs

See All >

Music ▾

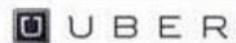
All Genres ▾

MUSIC QUICK LINKS

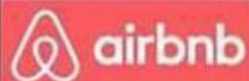
Redeem

Account





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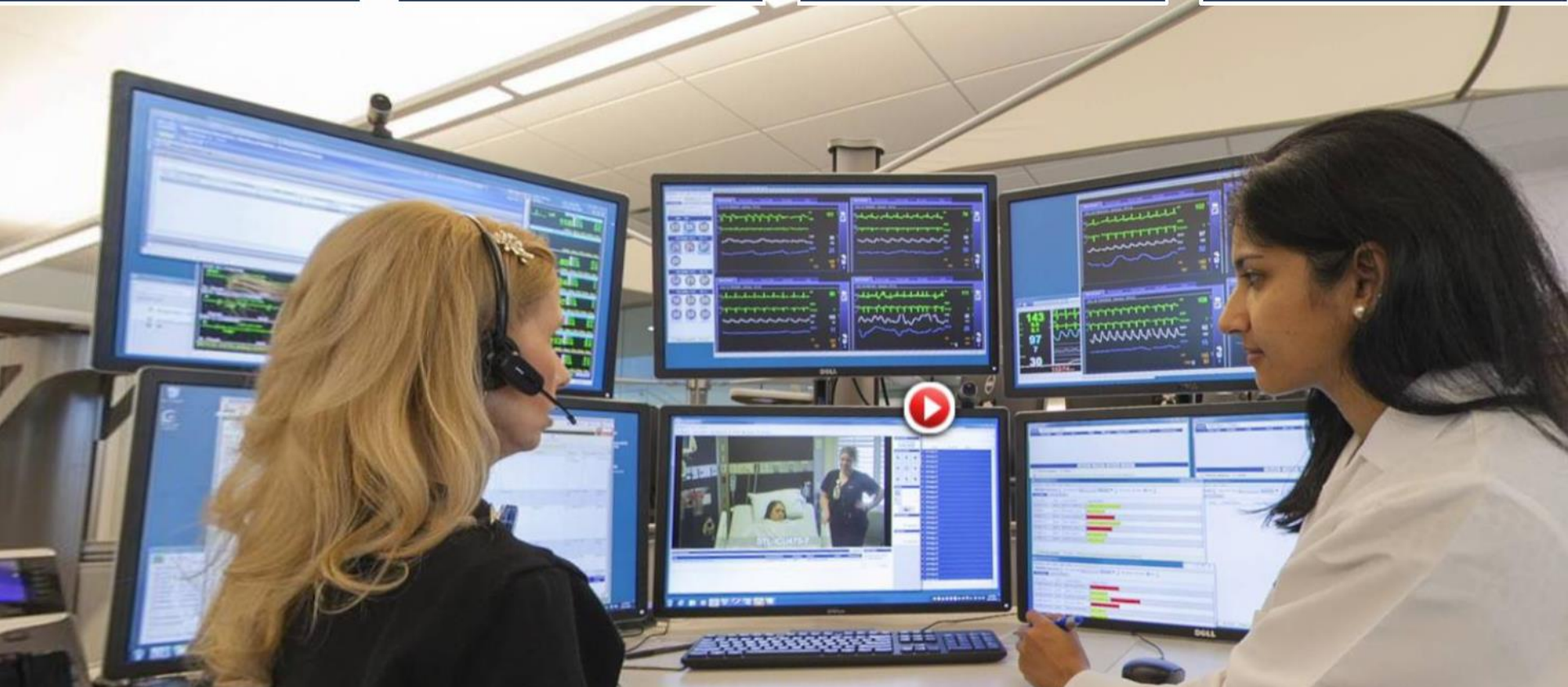


SafetyWatch

HomeMonitoring

NurseOnCall

Telestroke



A sector in full transformation



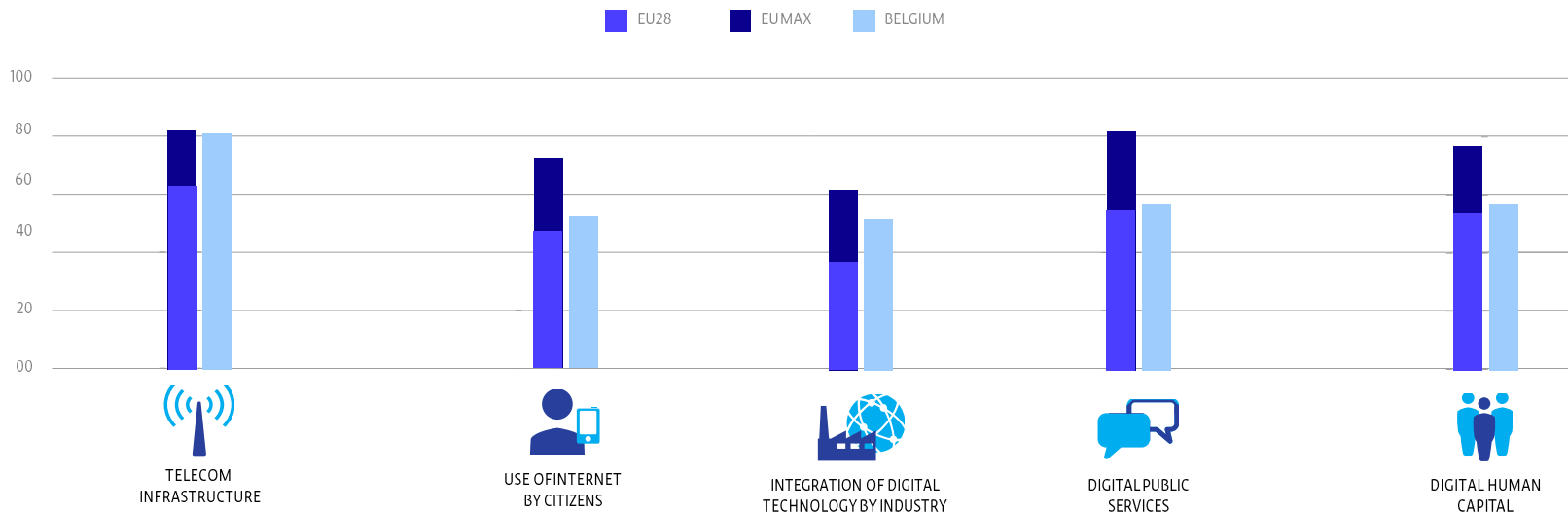
Digitalization is an opportunity to
preserve our resources
create jobs
put 'you' in the center



3 TOWARDS A DIGITAL BELGIUM

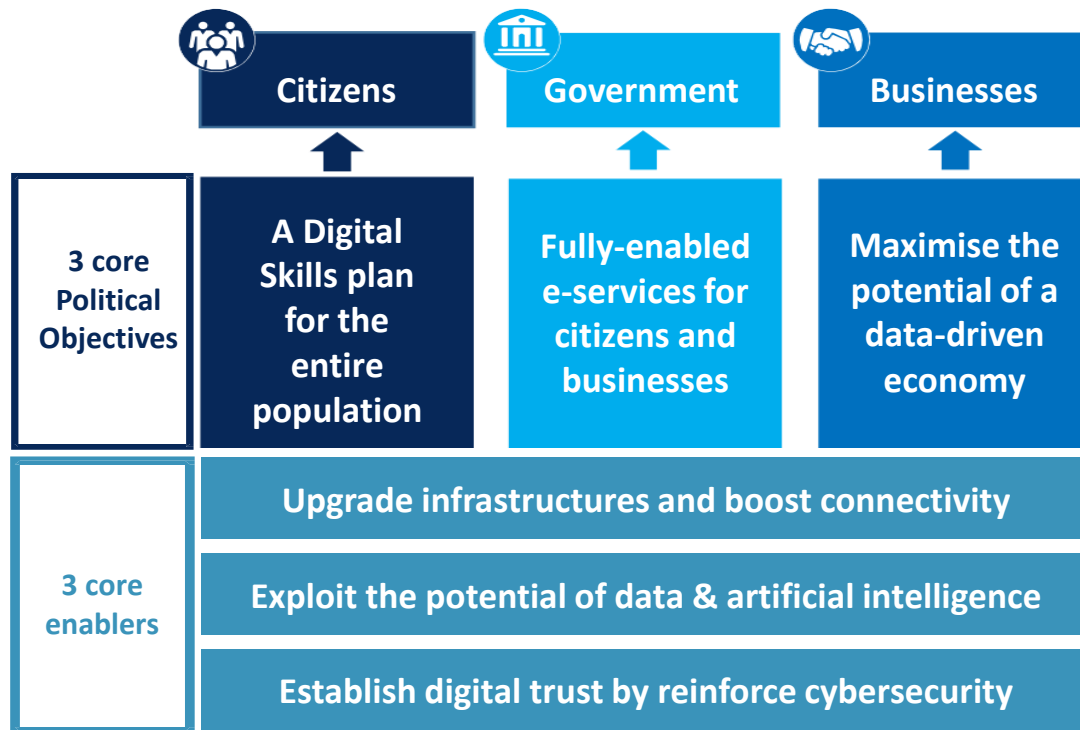


Belgium's digital position in Europe



Source: Digital Economy and Society Index (DESI), 2017

3 core enablers & 3 political objectives





Smart Cities : 4 focus areas

SMART ENERGY

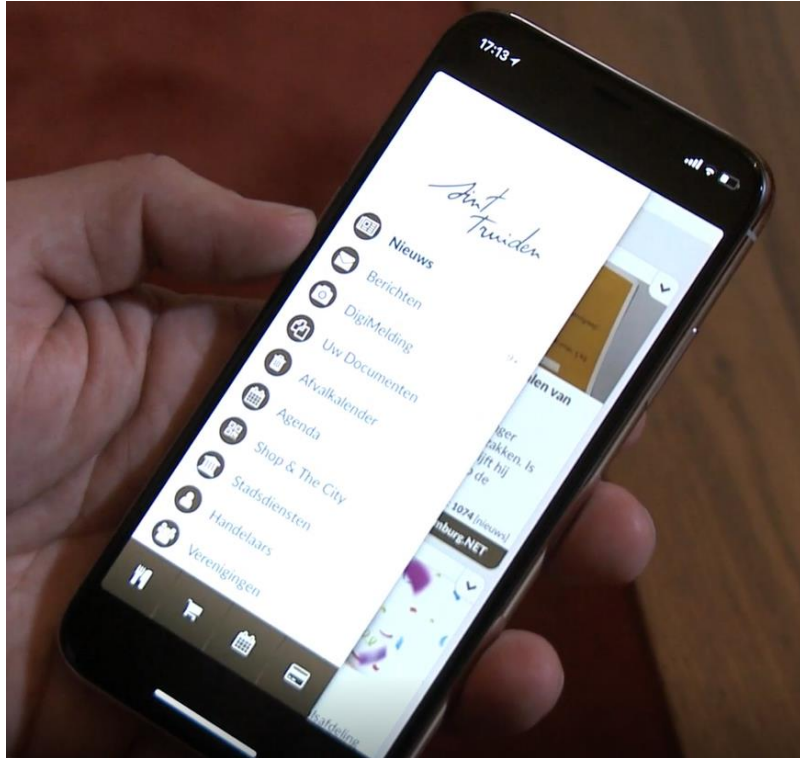
**SMART MOBILITY &
LOGISTICS**

**SMART DIGITAL
COMMUNICATION,
INFRASTRUCTURE
& SECURITY**

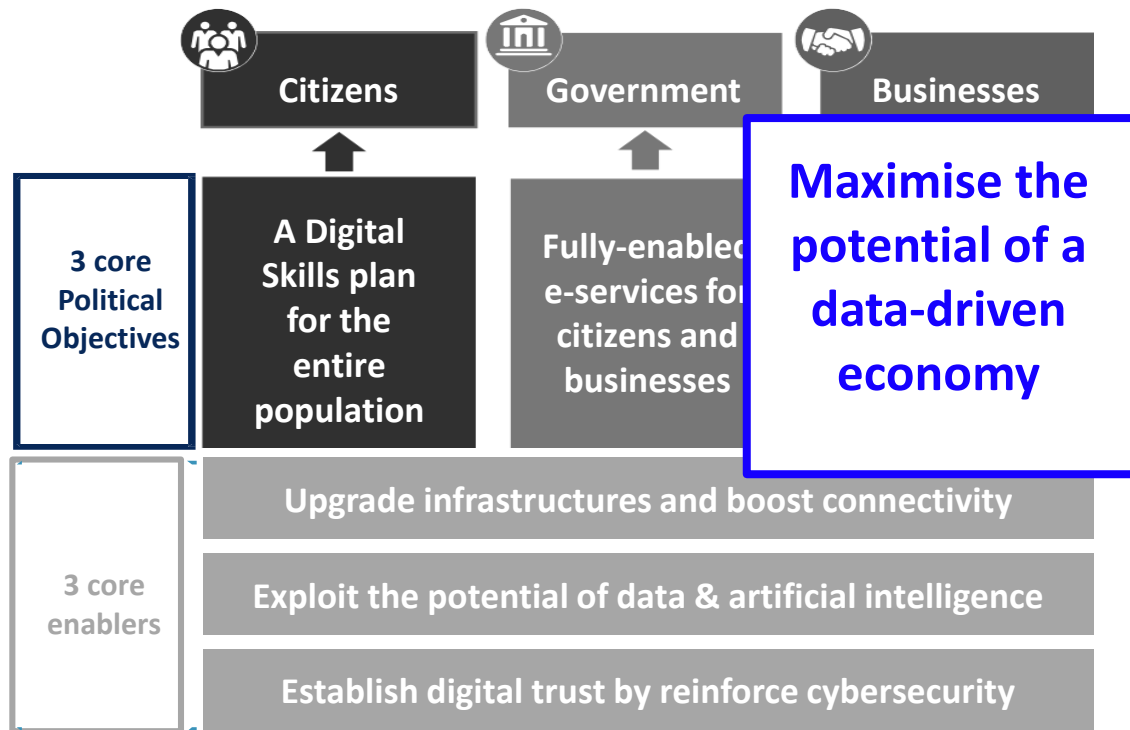
**SMART BUILDING
AND DISTRICTS**

Smart Cities Award 2018

*Sint
Truiden*

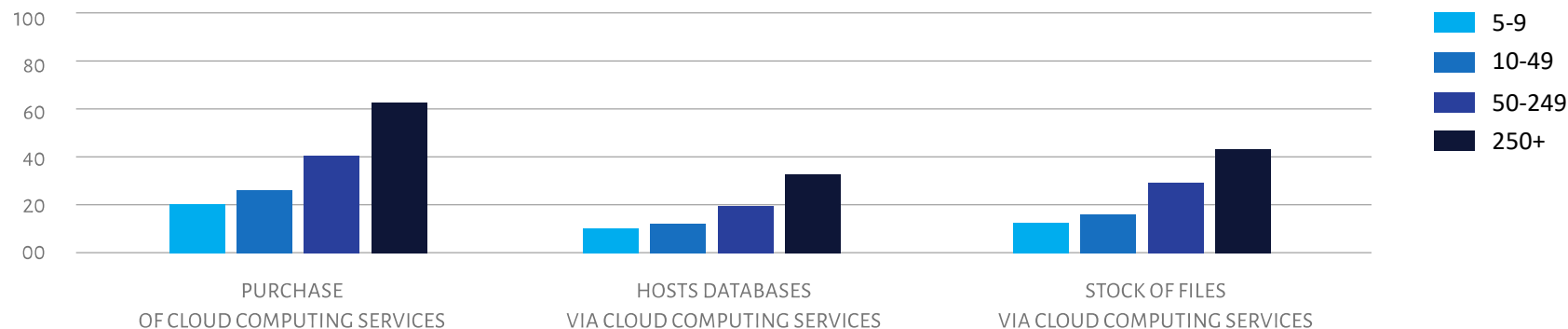


3 core enablers & 3 political objectives



The cloud gets mainstream in larger companies

CLOUD COMPUTING SERVICES (% OF ENTERPRISES) PER SIZE CLASS—2016



- **THE BELGIUM INDUSTRY HAS MANY SMEs, FOR WHICH DIGITIZATION REMAINS OFTEN A CHALLENGE**
- **TRUST IN DIGITAL AND BUSINESS PARTNERSHIPS CAN HELP SMEs TO ACCELERATE**

Digital Journey Tracker

What is your line of business?

Physical Products

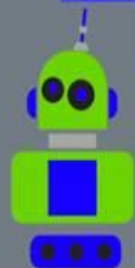
Digital Products

Services

Hi, welcome on your digital journey. I am your digital companion and will guide you on your trip to digitisation:

1. Select your company's line of business above or select a zone of impact on the map
2. Select your most relevant markers on the map for further reading

Have an inspiring journey.



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www.digitaljourneytracker.be
an inspiration for “tasting” digital tactics



**Together we boost Belgium
in tomorrow's digital society**

Digital Brussels



Embracing technology
Embracing ambition

Thank you



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