

Transforming your business through cloud - powered by AI -

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Germany – The Economic Powerhouse of the Eurozone

- Growth & innovation engine of German economy w/ **3.5m** companies & **55%** of net added value
- **28k** SMBs w/ >100 employees vs. UK & FR w/ 15k

- **Berlin** as main EU startup hub besides London
- Investments at all-time high

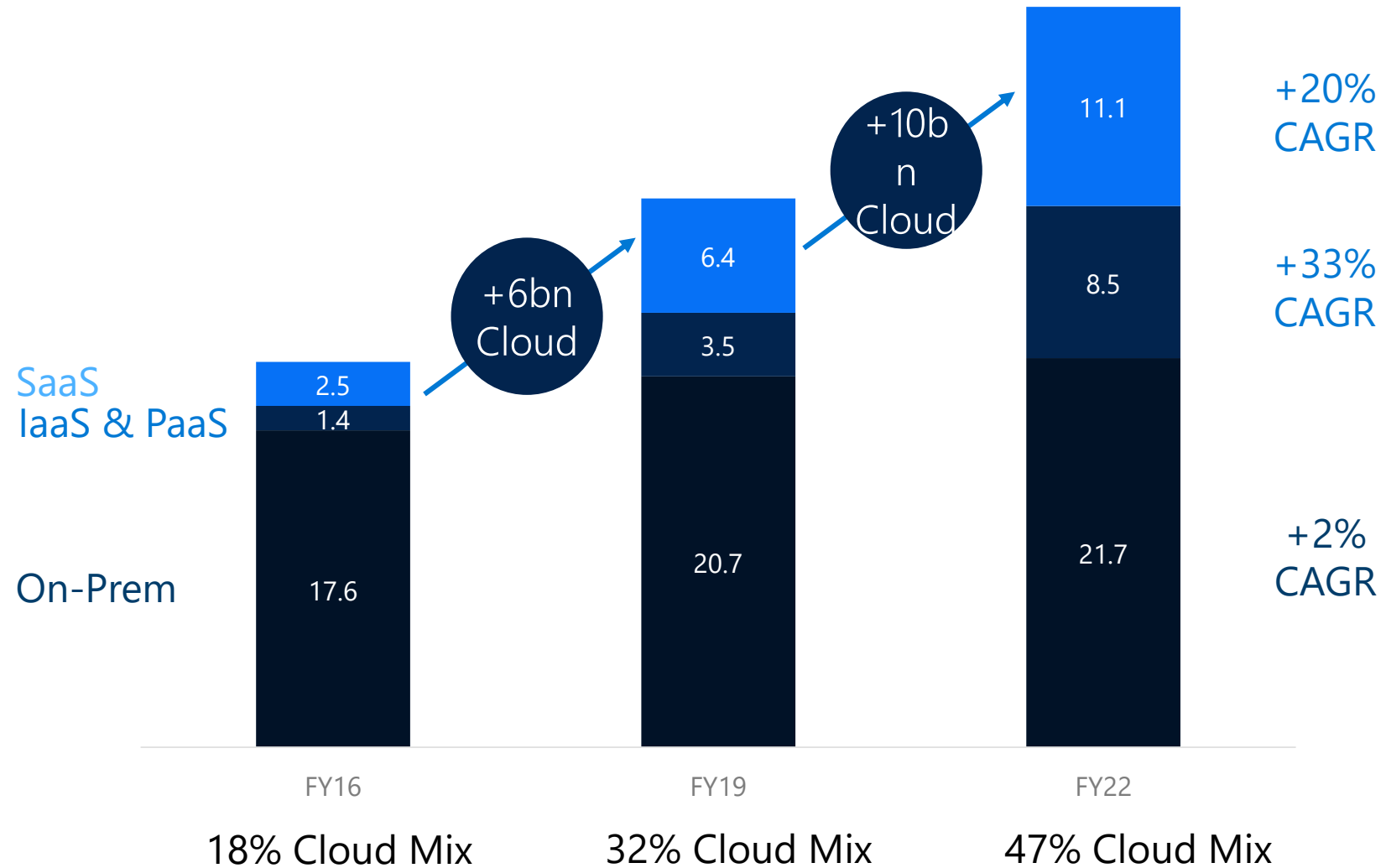
- Lack of >**400k** skilled workers, fostering digital skills as top prio of national AI strategy
- Gov plan to invest **\$3.4b** until 2025 in AI

- **1m** developers, #3 WW after India & US
- Large number of ISVs (**80k**) incl. players like SAP

- **\$20bn** IT spend, weak eGovernment
- Privacy DNA w/ first WW privacy law (1970), growing focus on cybersecurity

Source: WW Executive Market Indicators Tool; OECD; Destatis.de; BMWi; Statista; Handelsblatt

German IT Market continues transformation towards cloud





Hannover Messe April 2019





DIGITALSTADT
DARMSTADT



Modern workplace



Business applications



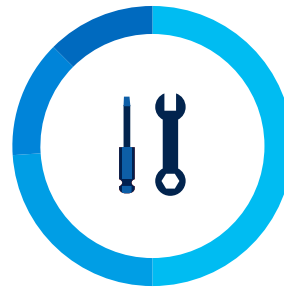
Applications & infrastructure



Data & AI



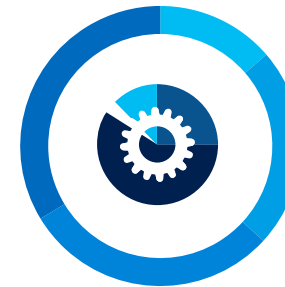
Digital Transformation



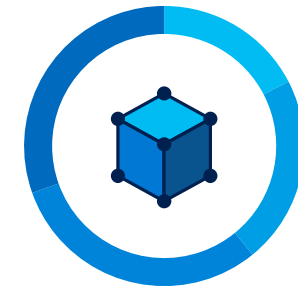
Empower employees



Engage customers



Optimize operations



Transform products

“As a culture, we are moving from a group of people who know it all to a group of people who want to **learn it all.** ”

-Satya Nadella



Our approach to lead effective change

1 Set vision and strategy, clarify them through continuous communications

2 Lead with new opportunity to drive desire for change

3 Build capability: growth-mindset, re-skill, re-train, hire new talent

4 Recruit people managers community to drive change

5 Reinforce confidence in organization's ability to change

How Does Microsoft Help you thru this journey?

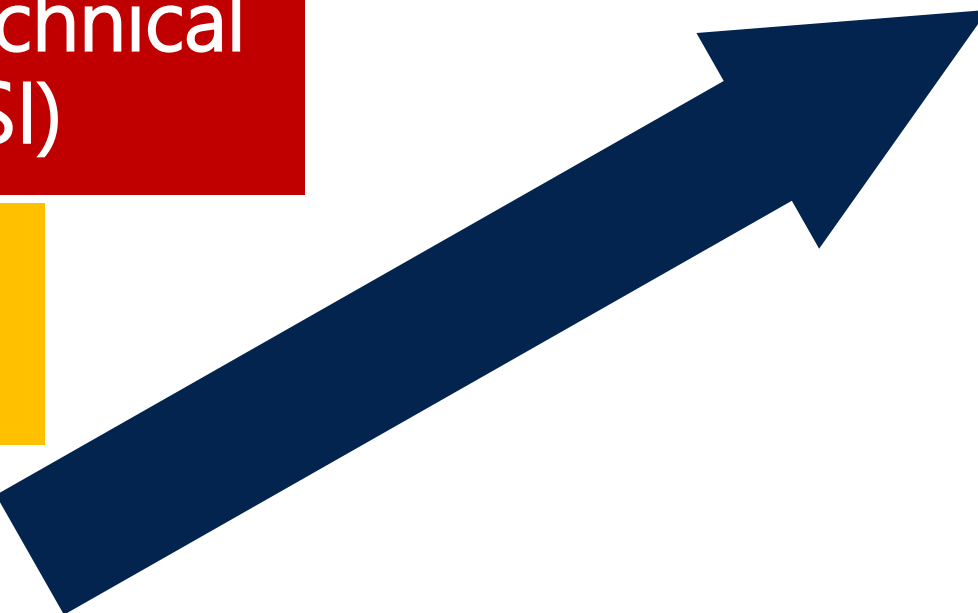
Start in the Cloud
Fast Track

Build your Technical
Skills (TSI)

Start POC / Pilot
//Solutions Catalogue

Learn & Experience
EBCs / MTCs / CIEs

Accelerate Cloud
Usage
Customer Success
Managers & Partners



FastTrack for Microsoft 365

Your partner for Microsoft 365 success

- Onboard to Microsoft 365 services and migrate your data
- Deploy chat-based collaboration and productivity apps
- Enable identity, device management, and modern security
- **New!** Application compatibility services for modern desktop
- Gain customer user adoption and realize business value
- Delivered by Microsoft engineers or approved partners
- Included in your eligible subscription at no additional cost





Thank you

mbuf Momentum

Ralph Alkemade
Alain Genevaux

mbuf 2.0

Develop & Invest in mbuf Champions

Boost mbuf awareness

Use a common collaboration platform (Teams)

Share latest "hot news"; "Newsticker"

Grow the community

mbuf AGs

CIO Kreis	
A. Küçük Dr. K. Rotter	S. Müller

Dynamics CRM	
C. Gütter	L. Brombas

Enterprise Infra	
A. Schäfer / J. Fröhler A. Wacker	R. Concu S. Bötter

Collaboration	
S. Schäde B. Schippler	C. Heyde

Dynamics AX	
M. Drude Dr. T. Döring	A. Fink

Future Technologies	
C. Bäcker J. Wössner	T. Frähler J. Writgen

Development	
Dr. F. Spiegel R. Nabulsi	P. Teilmeier

Dynamics AX-Administrator	
T. Weit	A. Fink

IT Security	
H. Riger N. Breidohr	C. Duesmann

License Management	
Dr. F. Spiegel R. Nabulsi	P. Teilmeier

Dynamics AX-Fin/Control	
M. Teichmann	A. Fink

Workplace Management	
T. Kraus P. Schubert	T. Hendricks





Thank you