

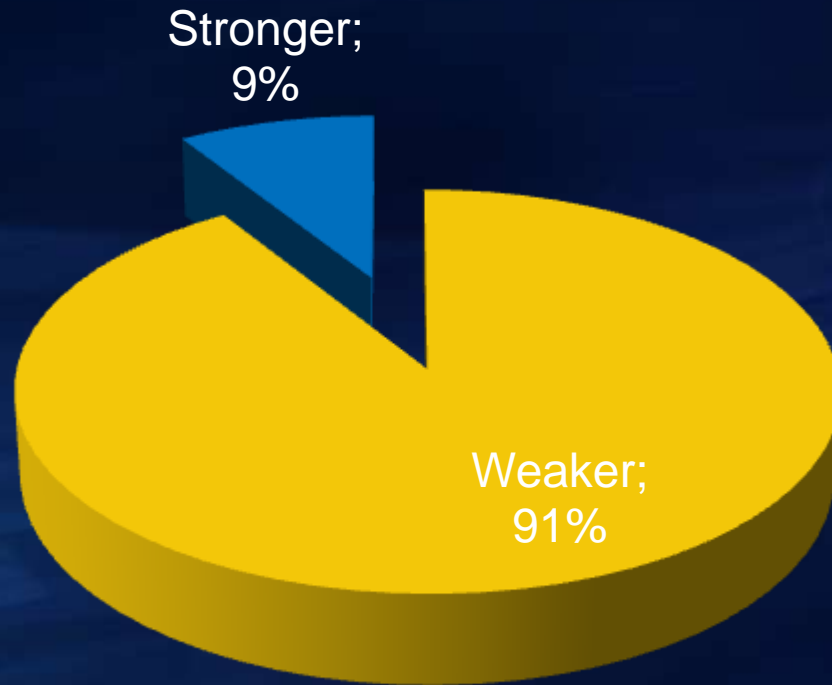
# Is it over? Business perspective on the current situation



Mindaugas Glodas  
General Manager  
Microsoft Baltics



# When Crisis is Over...



“Research Shows that only 9% of companies come out of a recession stronger than they went into it!”

HBR, March 2010

# Upward circles

**Fast Growth**

**Invest in  
regional pool**

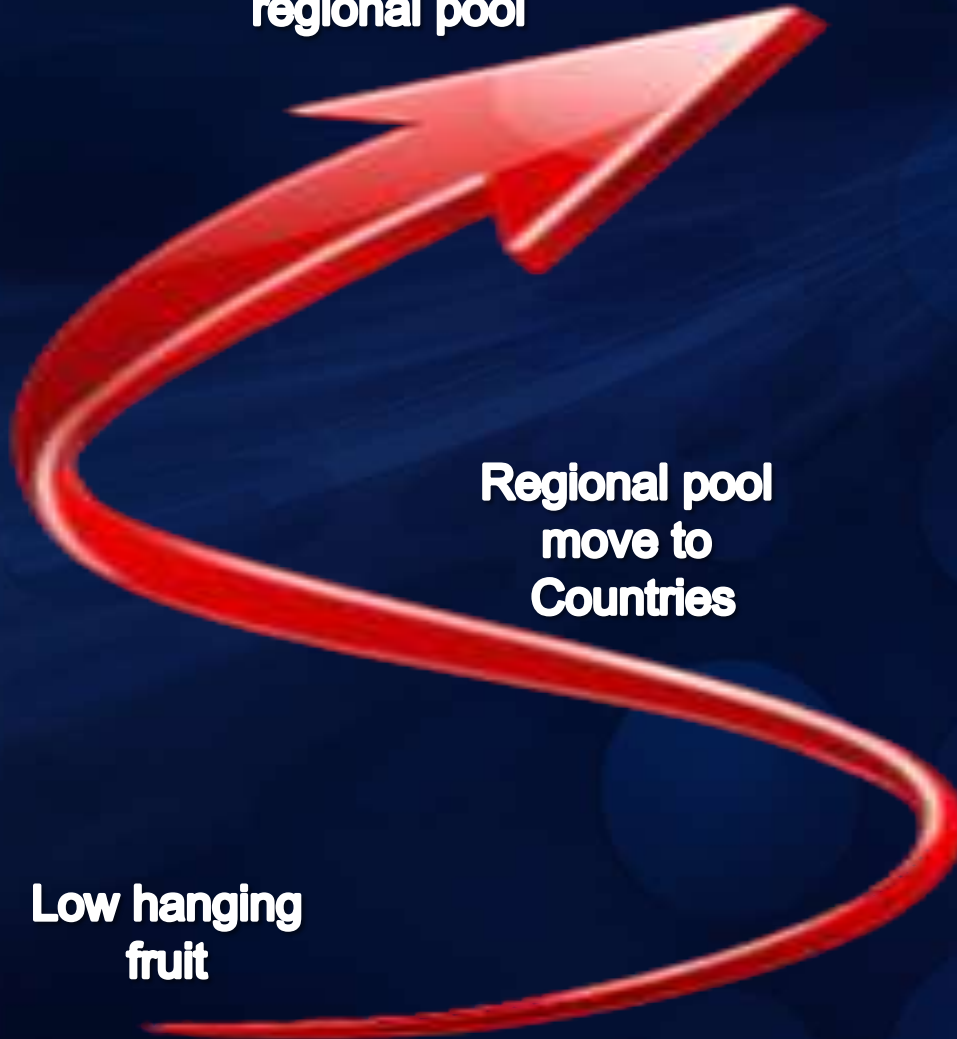
**Managing  
Complexity**

**Harvesting**

**Regional pool  
move to  
Countries**

**Low hanging  
fruit**

**Invest in  
regional  
pool**



# Customers under Pressure

Consumers  
& End Users



*Growing  
Influence With  
More Tech  
Access*

CxO



*Under Intense  
Pressure To  
Innovate*

CIO



*Must Cut Costs &  
Create Business  
Value*

CFO



*Serving As Chief  
Procurement  
Officer*

BDM



*Losing  
Authority*

# Productivity (2006)

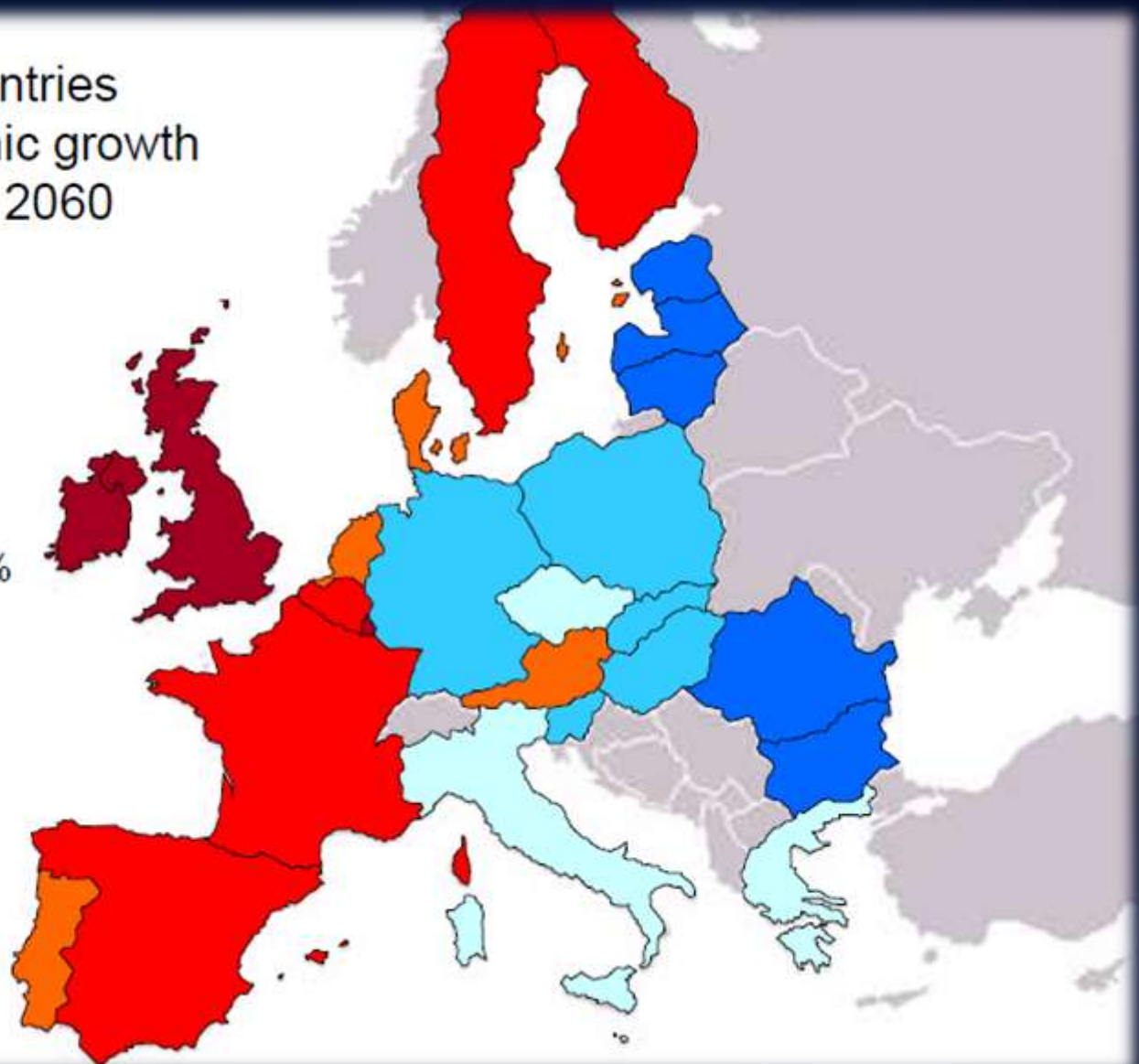
	Employee Productivity (000 EUR/emp)	Average Employee Cost (000 EUR/emp)	Relative employee productivity (%)
EU-27	43.5	28.8	151.1
BE	62.8	44.2	142.2
BG (1)	5.4	2.6	204.7
CZ	19.1	11.4	166.8
DK	65.9	39.1	168.8
DE	53.6	35.7	150.4
EE	17.6	9.2	191.0
IE (1)	83.5	:	:
EL	26.9	21.9	122.6
ES	38.6	26.1	148.0
FR	54.2	40.6	133.5
IT	41.6	31.2	133.1
CY (1)	32.9	21.2	155.3
LV	13.6	5.3	255.7
LT	10.7	6.1	177.4
LU	68.7	43.0	160.0
HU	16.6	9.8	169.4
MT	:	:	:
NL (2)	50.8	33.5	151.6
AT	56.6	37.4	151.2
PL (1)	16.1	7.6	210.7
PT	21.6	13.3	162.2
RO (1)	7.0	3.6	194.4
SI	26.4	18.0	146.8
SK	18.8	8.7	216.9
FI	65.0	40.1	162.2
SE	59.4	43.9	135.3
UK	60.5	33.9	178.5
NO	109.2	51.3	212.8

Source: Eurostat (2010)



# EU population growth Forecast

EU countries  
demographic growth  
2008 – 2060



Source : Eurostat





# In search for Sources Of Efficiency

BEFORE



TODAY



MEANS OF ENABLEMENT



# IDC Study on ICT Skills

- Microsoft commissioned IDC to conduct a European Study on ICT skill requirements across different industries.
- Study was performed October- December, 2009
- Essentially, three questions were to be answered:
  - Will the economic crisis accelerate the transformation to a knowledge economy increasing the need for digital competencies across all sectors and all jobs?
  - What will be the impact on the type of skills, the type of competencies and the level of skills needed across the pyramid?
  - Are these skills already available, is training needed and what will be the impact on the value of certification?

# Main Study Findings

- Increase in ICT skills requirements is driven by **technology trends** – not the recession
- There are **few variations** between countries, company sizes and industry sectors
- To cater for the increased demand for ICT skills training of **people currently in the workforce** must be undertaken
- In five years, **less than 10% of jobs** will require no ICT skills whatsoever

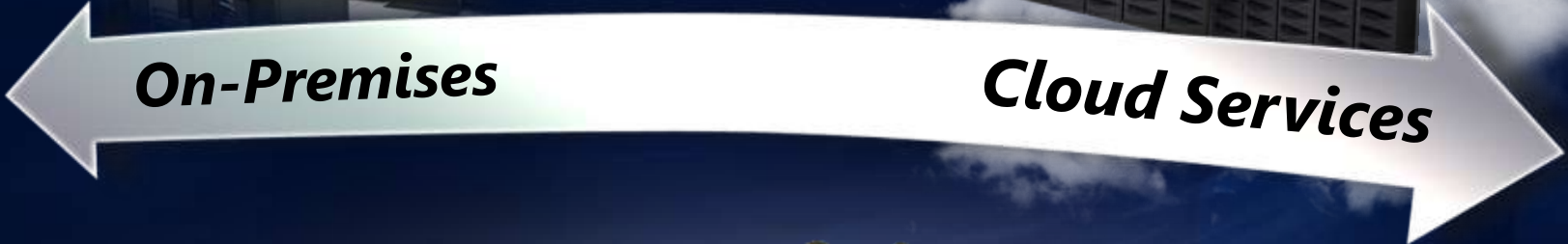
# Unlocking Human Potential

“The illiterate of the 21st century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn”

Alvin Toffler







**On-Premises**

**Cloud Services**

PC



BROWSER



PHONE

# People are Business Drivers

*Develop  
Relationships*

*Drive  
Innovation*

*Improve  
Operations*

*Build  
Partnerships*





# New Business Environment

## Business Changes



# Facilitate Teamwork & People Connections



Unified  
communications



Synchronization



Connectivity &  
Sharing



Mobility



# Find Data & Better Business Information



Find what you  
are looking for



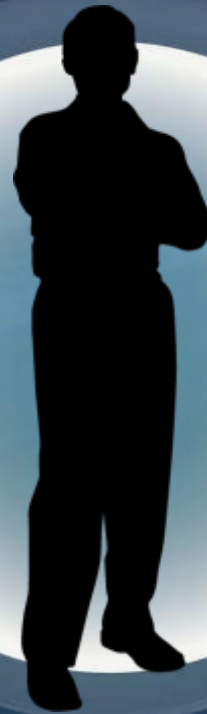
Integrate multiple  
systems



Analyze complex  
business info



Enable decision  
making on different  
levels



# Protect & Manage Content



Manage content



Compliance



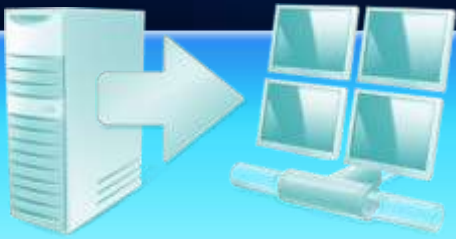
Protect and recover  
information



Reduce paperwork and  
manual processes



# Reduce IT Cost & Ensure Security



Simplify implementation



Manage security risks



Reduce management  
and support costs



Control access and  
authentication





“This is a once-in-a-lifetime economic crisis. But I think it's also a once-in-a-lifetime opportunity to think about our priorities again and make the investments that put us on the right foot.”

Steve Ballmer  
Microsoft CEO

@ U.S House of Representative Democratic Caucus Retreat, February 2009



The image features a scenic landscape of a long, straight asphalt road stretching towards a horizon under a dramatic sunset sky. The sun is a bright, glowing orb on the left side, casting a warm orange and yellow light across the sky and the road. The sky is filled with scattered, light-colored clouds. The road is flanked by green fields, possibly corn, and a dashed yellow line runs down its center. In the top left corner, the Microsoft logo is displayed in white, bold, sans-serif font, with a registered trademark symbol. Below it, the slogan "Your potential. Our passion." is written in a smaller, white, italicized sans-serif font.

**Microsoft**<sup>®</sup>

*Your potential. Our passion.*<sup>™</sup>