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OF MOBILE APPLICATION COMPANIES



ΣΕΚΕΕ
ΣΥΝΔΕΣΜΟΣ ΕΤΑΙΡΙΩΝ
ΚΙΝΗΤΩΝ ΕΦΑΡΜΟΓΩΝ ΕΛΛΑΔΟΣ



Technology in motion!



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Everything Everywhere:

The future of Internet is

Mobile,

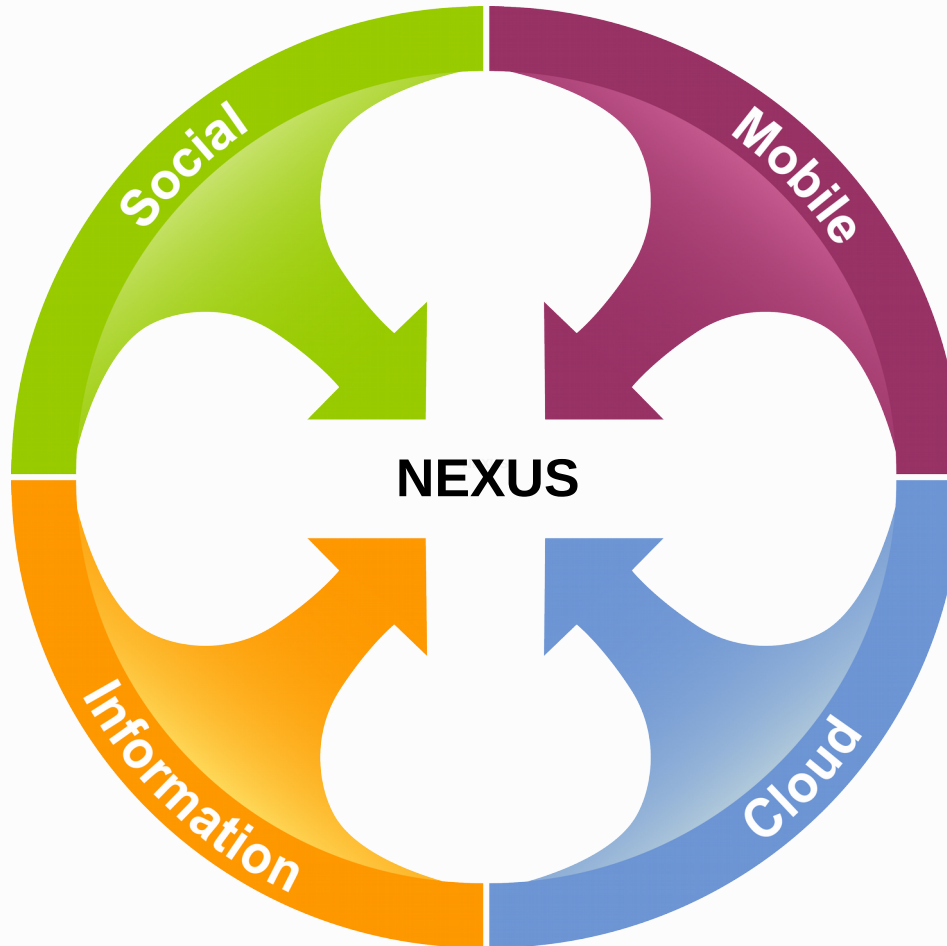
Ubiquitous,

Disruptive!



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Gartner's Nexus of Forces: Social, Mobile, Cloud and Information



See "High-Tech Tuesday Webinar: Impact of Cloud, Data, Mobile and Social Forces on the Enterprise Software Markets" (G00248165)



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Revolution!

2016:

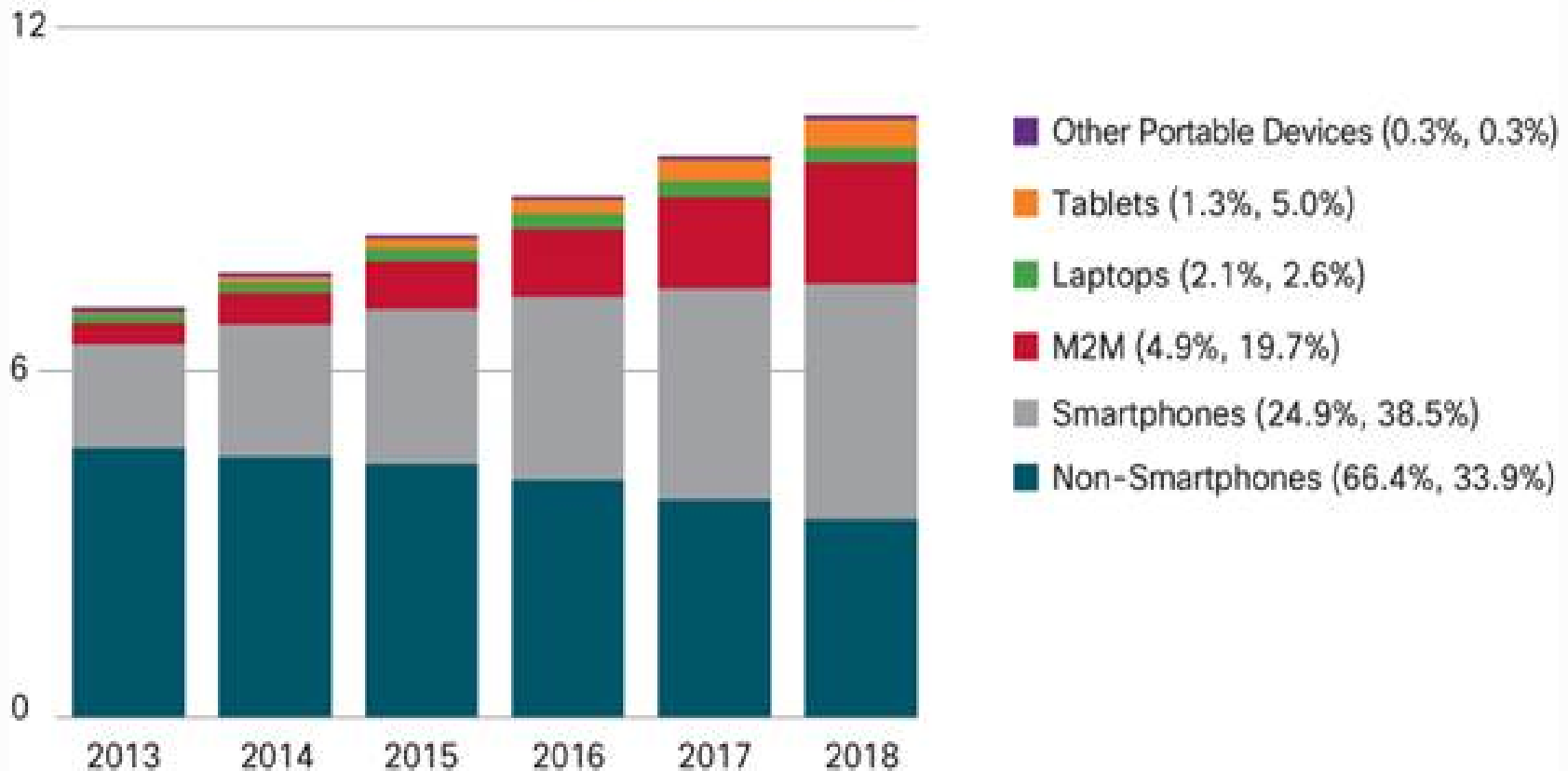
The number of mobile devices
is bigger
Than the world population!



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Billions of Devices

8% CAGR 2013-2018



Figures in parentheses refer to device or connections share in 2013, 2018.

Source: Cisco VNI Mobile, 2014

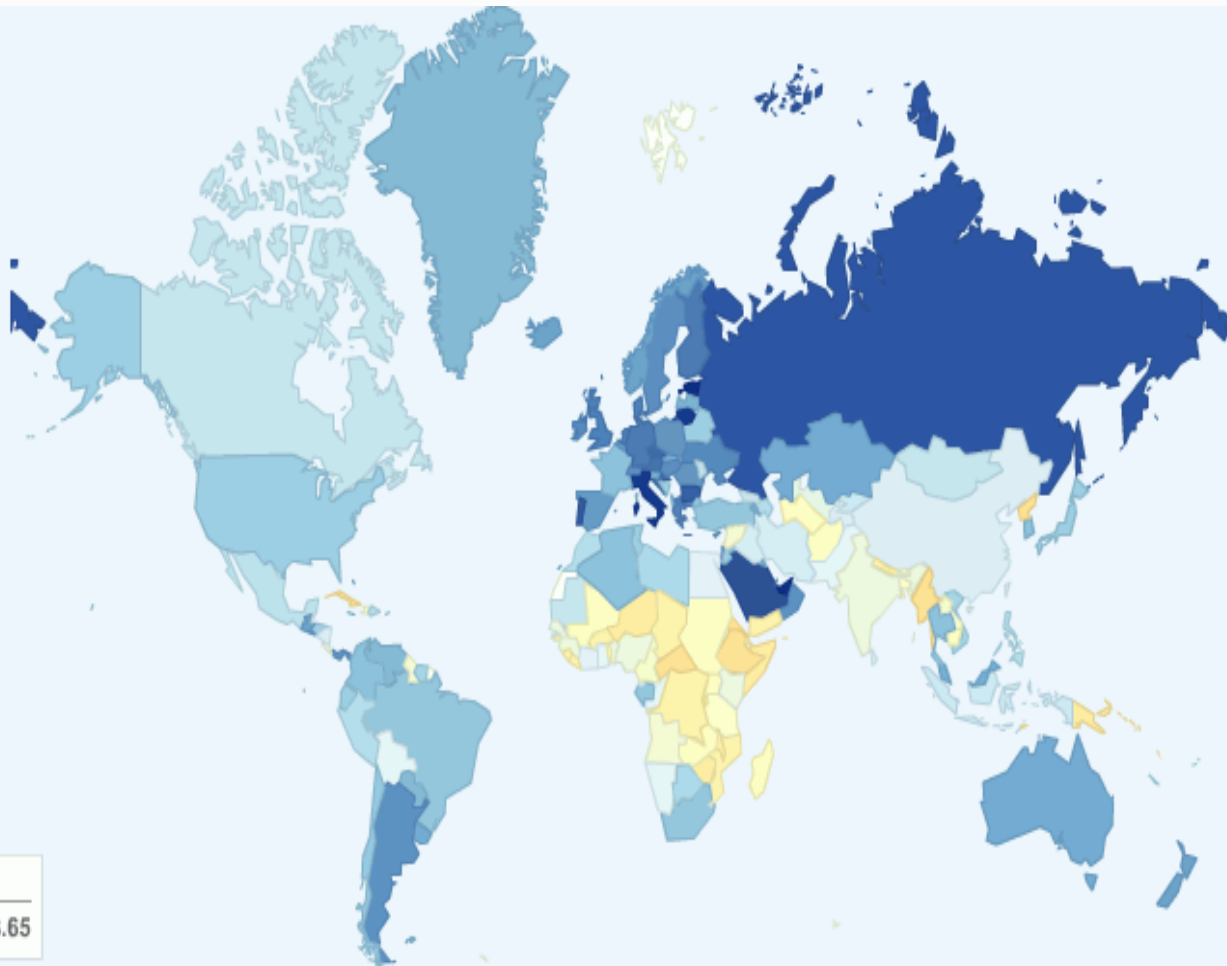
JOIN THE
MOBILE
★
★
REVOLUTION
★
NOW!





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A global market



• Source: Andrew Trench

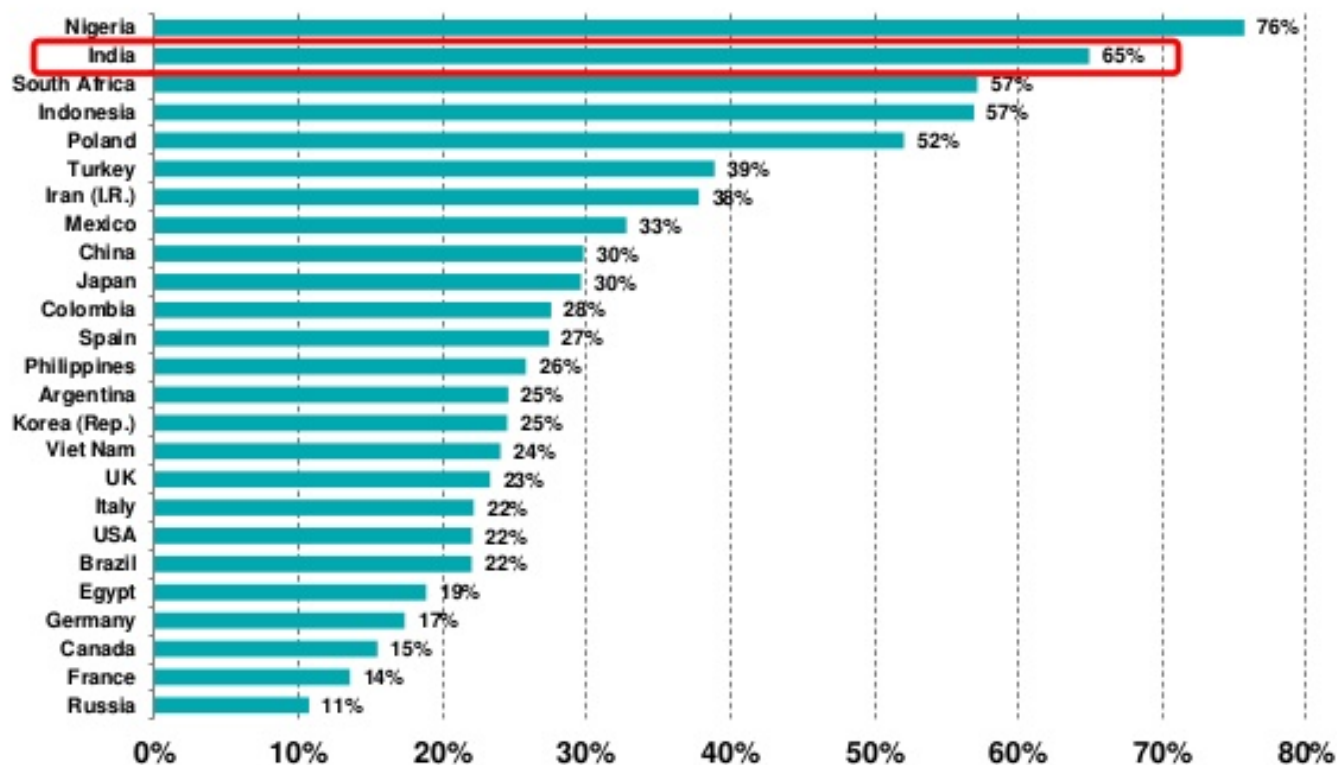
With huge sizes

- **1 billion** people will use smart--phones in 2016, **350 million** among them, will use them professionally
- The market of “mobiles” will exceed **1,3 trillion \$** until 2016 and will constitute **35%** of the technology investment
- The impact of mobile Internet to the industry might exceed **10 trillion \$ annually** in 2025.



Mobile = 65% of India Internet Traffic... More Mobilized vs. Most Other Countries

Mobile % of Total Internet Traffic by Country, 5/15



**JAN
2015**

GLOBAL DIGITAL SNAPSHOT

A SNAPSHOT OF THE WORLD'S KEY DIGITAL STATISTICAL INDICATORS

TOTAL
POPULATION



we
are
social

**7.210
BILLION**

URBANISATION: 53%

FIGURE REPRESENTS TOTAL GLOBAL
POPULATION, INCLUDING CHILDREN

ACTIVE
INTERNET USERS



we
are
social

**3.010
BILLION**

PENETRATION: 42%

FIGURE INCLUDES ACCESS VIA
FIXED AND MOBILE CONNECTIONS

ACTIVE SOCIAL
MEDIA ACCOUNTS



we
are
social

**2.078
BILLION**

PENETRATION: 29%

FIGURE REPRESENTS ACTIVE USER
ACCOUNTS, NOT UNIQUE USERS

UNIQUE
MOBILE USERS



we
are
social

**3.649
BILLION**

PENETRATION: 51%

FIGURE REPRESENTS
UNIQUE MOBILE PHONE USERS

ACTIVE MOBILE
SOCIAL ACCOUNTS



we
are
social

**1.685
BILLION**

PENETRATION: 23%

FIGURE REPRESENTS ACTIVE USER
ACCOUNTS, NOT UNIQUE USERS



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1st revolution

Water/Steam



2nd revolution

Electricity



3rd revolution

Automation



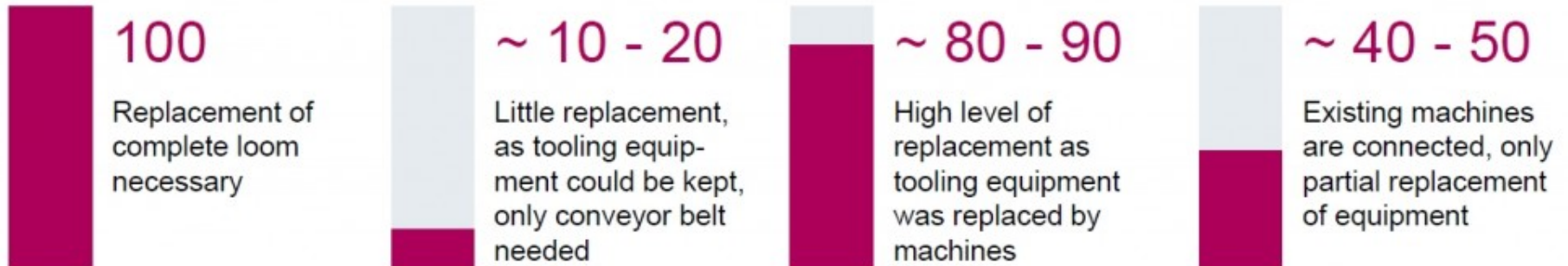
4th revolution

Cyberphysical systems



Replacement of equipment

Percent of installed base



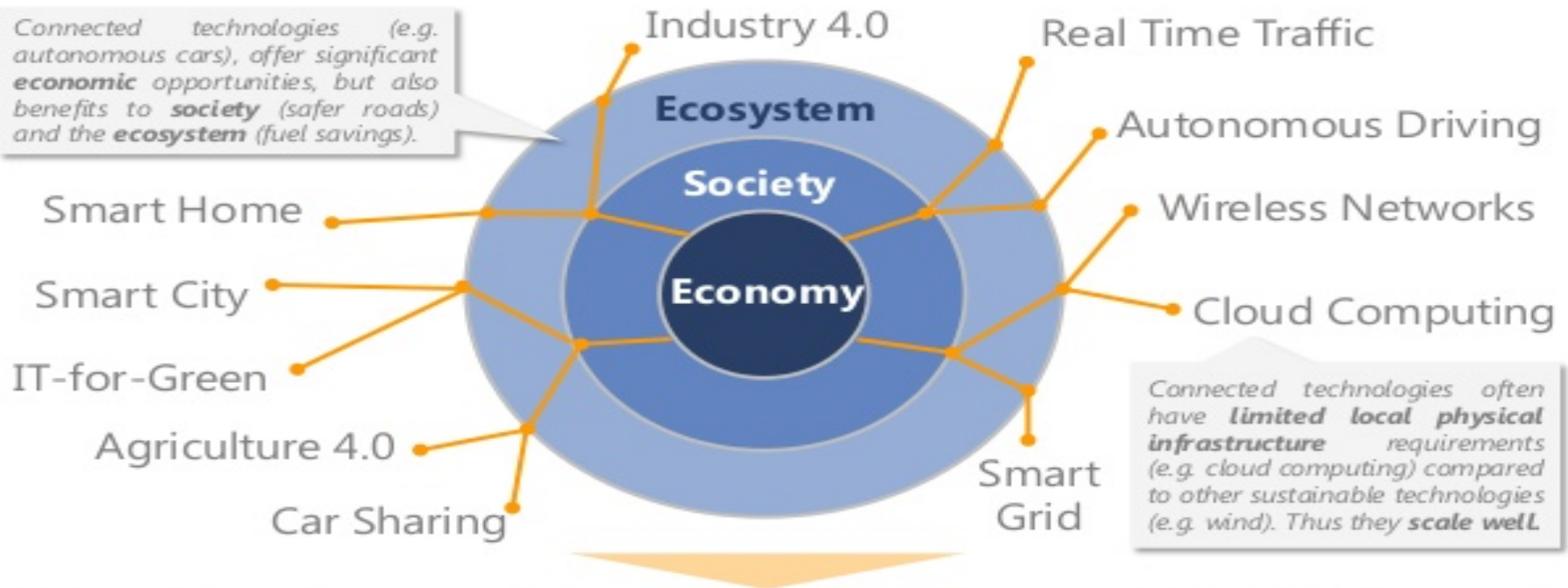


New ecosystems emerge

A Connected technologies as a catalyst for sustainability

High scalability due to limited infrastructure requirements

Connected technologies (e.g. autonomous cars), offer significant **economic** opportunities, but also benefits to **society** (safer roads) and the **ecosystem** (fuel savings).



Connected technologies often have **limited local physical infrastructure** requirements (e.g. cloud computing) compared to other sustainable technologies (e.g. wind). Thus they **scale well**.

From **optimised processes** to **improved decision making** – connected technologies are a **driver for sustainability**. They also offer high potential **scalability** of sustainability effects.



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DIGITAL STRATEGY

DIGITAL GOVERNANCE

PROCESS GOVERNANCE – DATA GOVERNANCE – TECHNOLOGY GOVERNANCE

SKILL AND CAPABILITY

LEADERSHIP – SKILL DEVELOPMENT – ORGANIZATION ALIGNMENT

PRODUCT AND PROCESS

SMART PRODUCTS

SMART INNOVATION
SMART PRODUCT LIFECYCLE
MANAGEMENT

SMART FACTORY /
SMART PRODUCTION

SMART SUPPLY CHAIN
DIGITAL, INTEGRATED AND
INTERCONNECTED

SMART SERVICES
DIGITAL AFTERSALES
SERVICES

SMART SALES
DIGITAL MARKETING
AND SALES

INFRASTRUCTURE AND TECHNOLOGY



**BIG DATA AND
ANALYTICS
PLATFORM**



**CLOUD SERVICES
INFRASTRUCTURE**



**CONNECTIVITY AND
SECURITY**



**ARCHITECTURE AND
APPLICATION
INTEGRATION**

PLAYERS AND ECOSYSTEM



COMPANY



CUSTOMERS



SUPPLIERS



PARTNERS



**SOCIAL MEDIA
AND CROWD**

ENABLERS



SENSORS



**MOBILE
DEVICES**



ROBOTICS



M2M



3D PRINTING

DIGITAL ENABLED BUSINESS MODEL

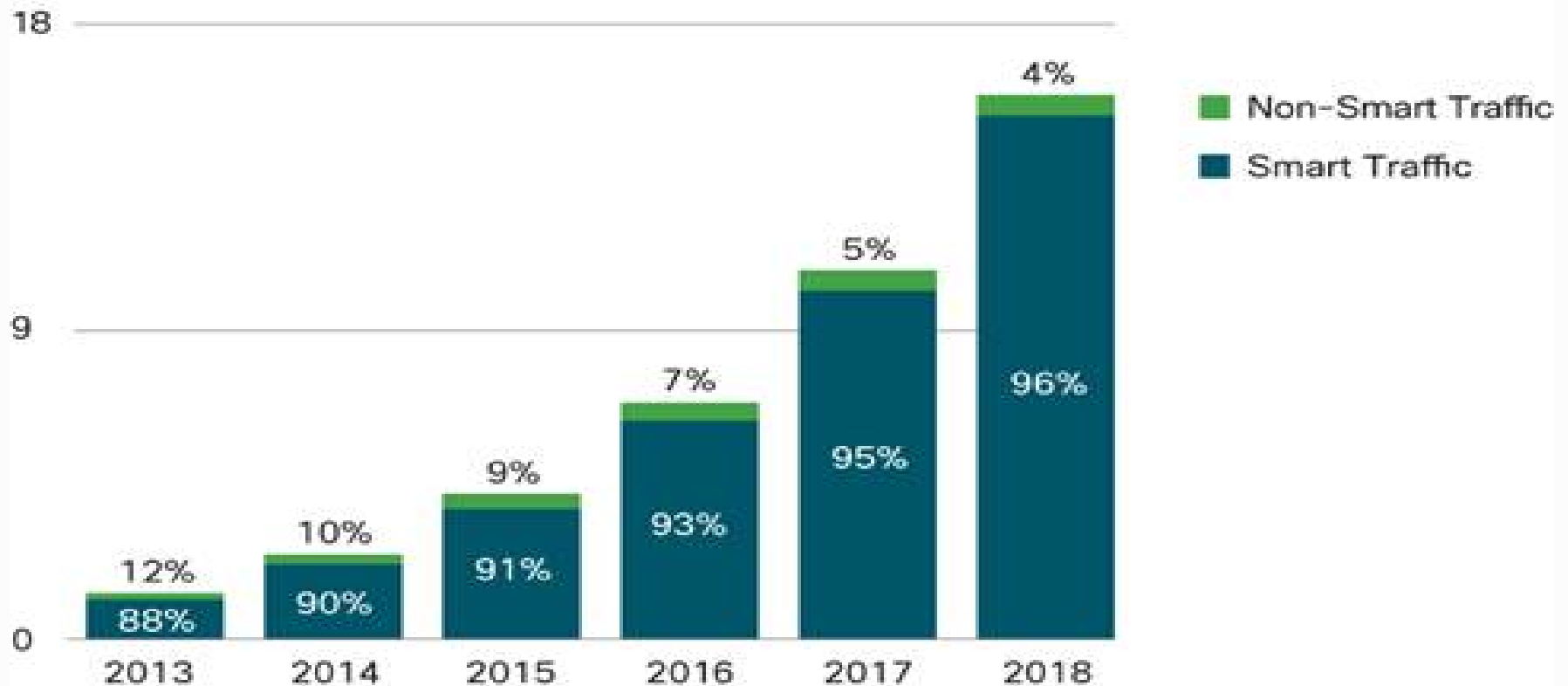


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Traffic explodes too!

Exabytes per Month

61% CAGR 2013-2018



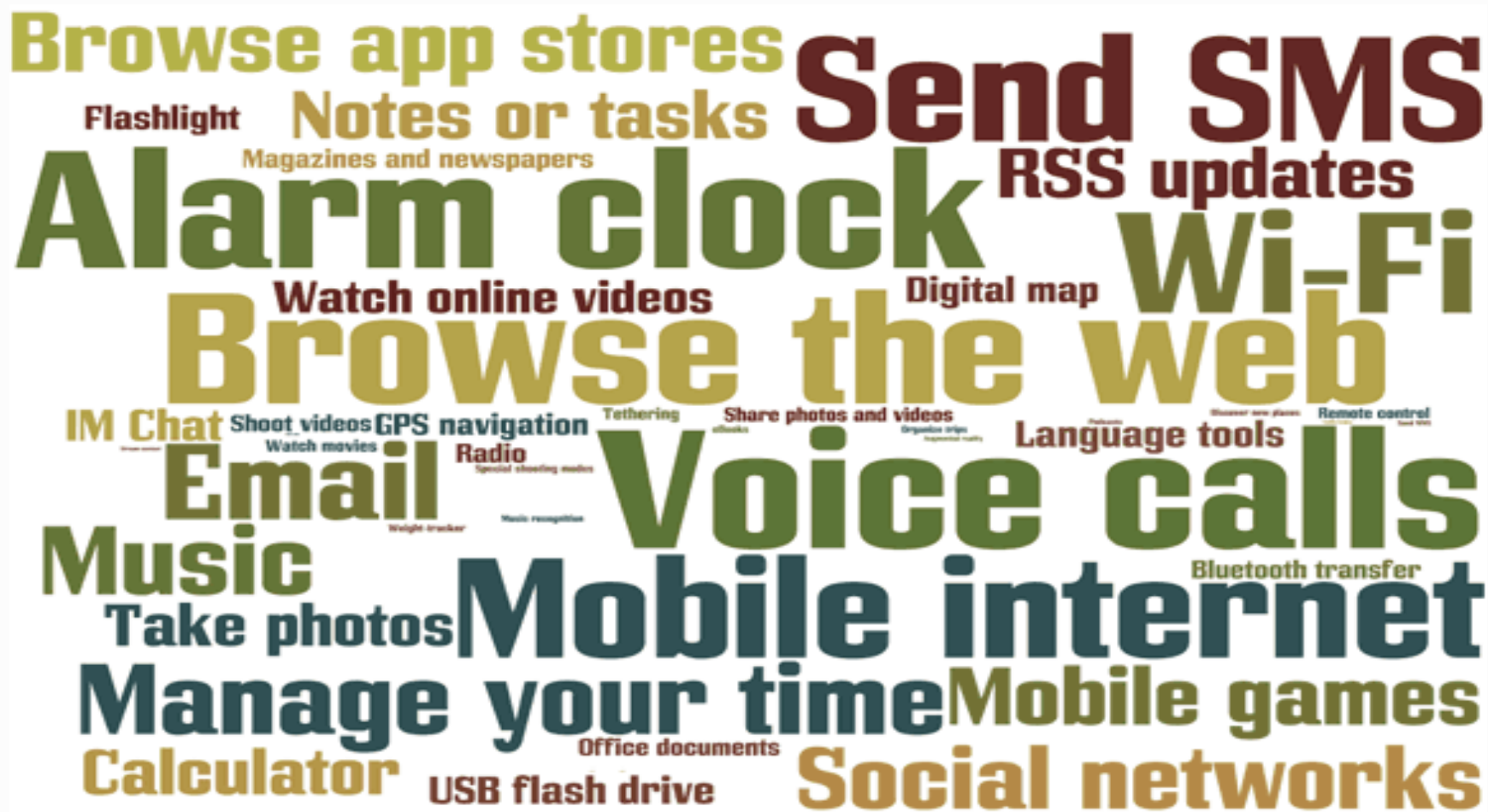
Percentages refer to device or connections share.

Source: Cisco VNI Mobile, 2014



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The daily routine...



Source:
GSMarena



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The MEGA TREND

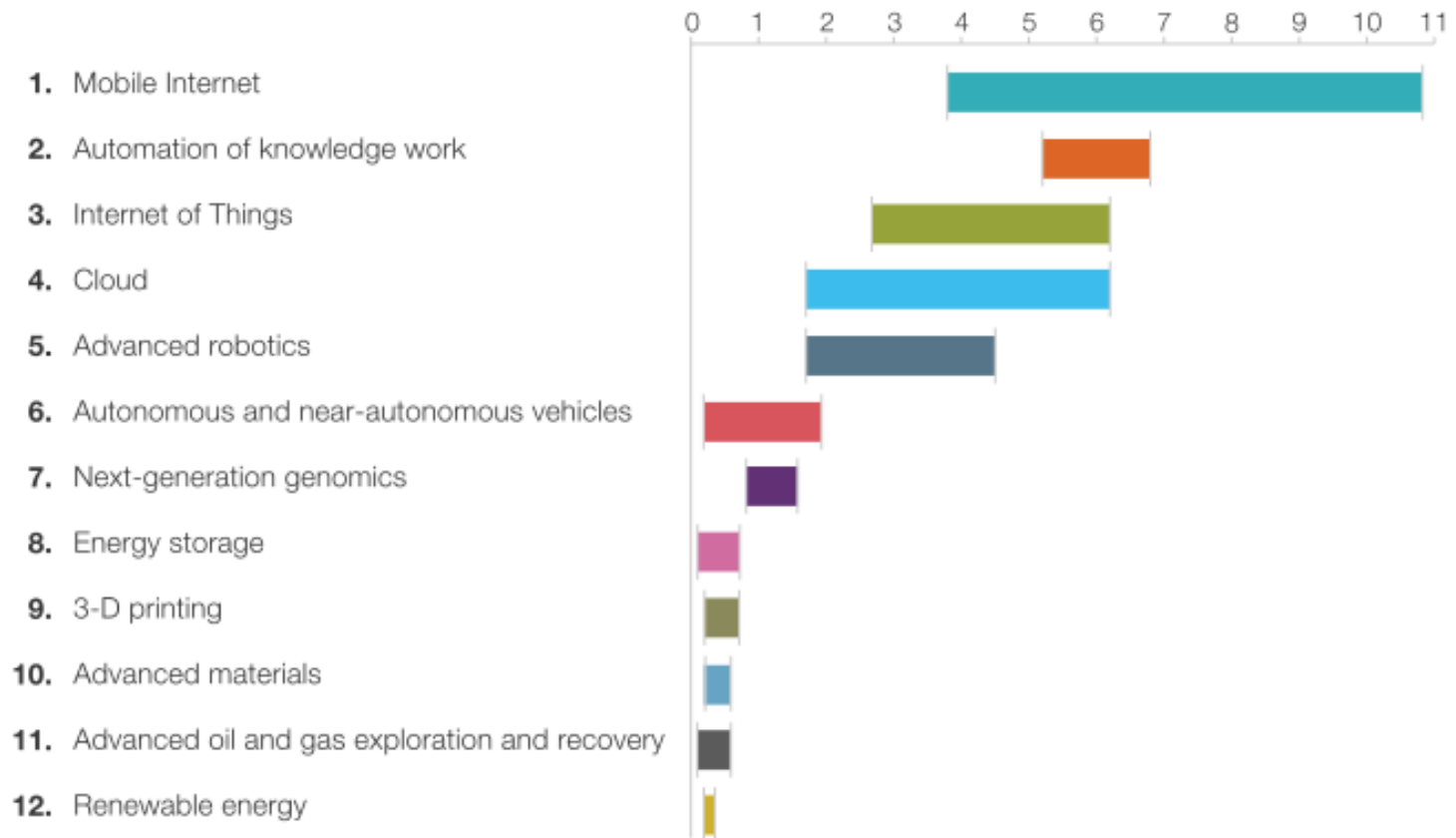
**Ubiquitous
computing = SaaS + Mobile
Internet**



EXPERIENCE = APPLICATIONS + NETWORKS

A gallery of disruptive technologies

Estimated potential economic impact of technologies across sized applications in 2025, \$ trillion, annual



SOURCE: McKinsey Global Institute



#1 **Mobile Internet**

Increasingly inexpensive and capable mobile computing devices and Internet connectivity

Potential economic impact in 2025 across sized applications of
\$3.7 trillion–\$10.8 trillion

10–20% potential cost reduction in treatment of chronic diseases
through remote health monitoring

Component technologies

- Wireless technologies
- Small, low-cost computing and storage devices
- Advanced display technology, natural user interfaces
- Advanced, low-cost batteries

Key applications

- Service delivery
- Worker productivity
- Additional consumer surplus from use of mobile-Internet services



#2 Automation of knowledge work

Intelligent software systems that can perform knowledge-work tasks

Potential economic impact in 2025 across sized applications of
\$5.2 trillion–\$6.7 trillion

Additional labor productivity could equal the output of **110 million–140 million** full-time workers

Component technologies

- Artificial intelligence, machine learning
- Natural user interfaces
- Big-data technologies

Key applications

- Smart learning in education
- Diagnostics and drug discovery in health care
- Discovery, contracts/patents in legal sector
- Investments and accounting in finance sector



#3 Internet of Things

Networks of low-cost sensors and actuators for data collection, monitoring, decision making, and process optimization

Potential economic impact in 2025 across sized applications of
\$2.7 trillion–\$6.2 trillion

Offers potential to drive **productivity across \$36 trillion** in operating costs of key affected industries: manufacturing, health care, and mining

Component technologies

- Advanced, low-cost sensors
- Wireless and near-field communication devices—eg, RFID (radio frequency identification tags)

Key applications

- Process optimization, especially in manufacturing and logistics
- Efficient use of natural resources—eg, smart-meter and smart-grid control of water and electricity
- Remote health-care delivery, sensor-enhanced business models



#4 Cloud

Use of computer hardware and software resources to deliver services over the Internet or a network

Potential economic impact in 2025 across sized applications of
\$1.7 trillion–\$6.2 trillion

15–20% potential productivity gains across IT infrastructure, application development, and packaged software

Component technologies

- Cloud-management software—eg, virtualization, metering
- Data-center hardware
- High-speed networks
- Software/platform as a service (SaaS/PaaS)

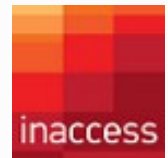
Key applications

- Cloud-based delivery of Internet services and applications
- Enterprise IT productivity

- ✓ Established in Athens in 2010, by **32** companies – today **70+** which develop **innovative** applications and services to **mobile devices**
- ✓ Its members have a global presence in **40+ countries**
- ✓ They have gained **international investors' trust** and have raised funds from the international markets.



The founding members of HAMAC





The new members 2012





The new members 2014

accuSONUS Citrix ByteMobile



econdais

$N=mc^2$



Pinnatta

upcom
Bringing business and IT together



Singular Logic

SOFTWeb®
adaptive I.T. solutions

softone
More than software



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HAMAC members

- **4.000 employees**, among them **1.000 scientists and engineers** of high academic and professional qualification
- have a total turnover of over **400 mil.€**
- have obtained a series of **distinctions** and **awards** at national and international level



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HAMAC Objectives

Growing the
ecosystem

Going global

Access to
capital

Enhancing
innovation and
entrepreneurship
policies



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Hellenic Mobile Cluster



a **competitive**, **globally**, cluster
which will contribute
to smart, sustainable, extroverted
development of its members
and all actors of the broader
ecosystem



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Greece @MWC2013





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Greece @MWC2014





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Greece @MWC 2015





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The winners from Greece - 2014

**Copernicus
masters**



**EUROPEAN
SATELLITE NAVIGATION
COMPETITION 2014**





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YOOR: The Greece challenge winners



EUROPEAN
SATELLITE NAVIGATION
COMPETITION 2014

Philippos Beveratos and Jean-Robert Malandra
Greece Challenge winners

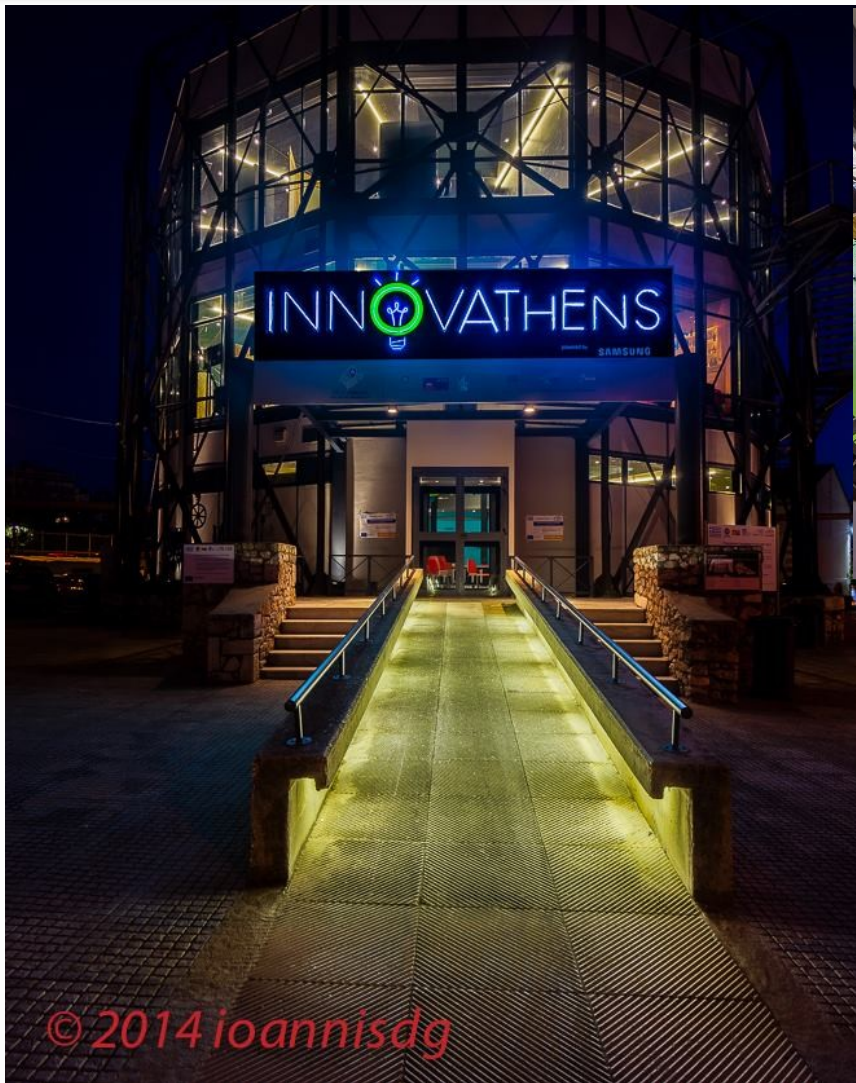


A HAMAC initiative, in cooperation with AUEB, Samsung and InnovAthens



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InnovAthens - Σynergies



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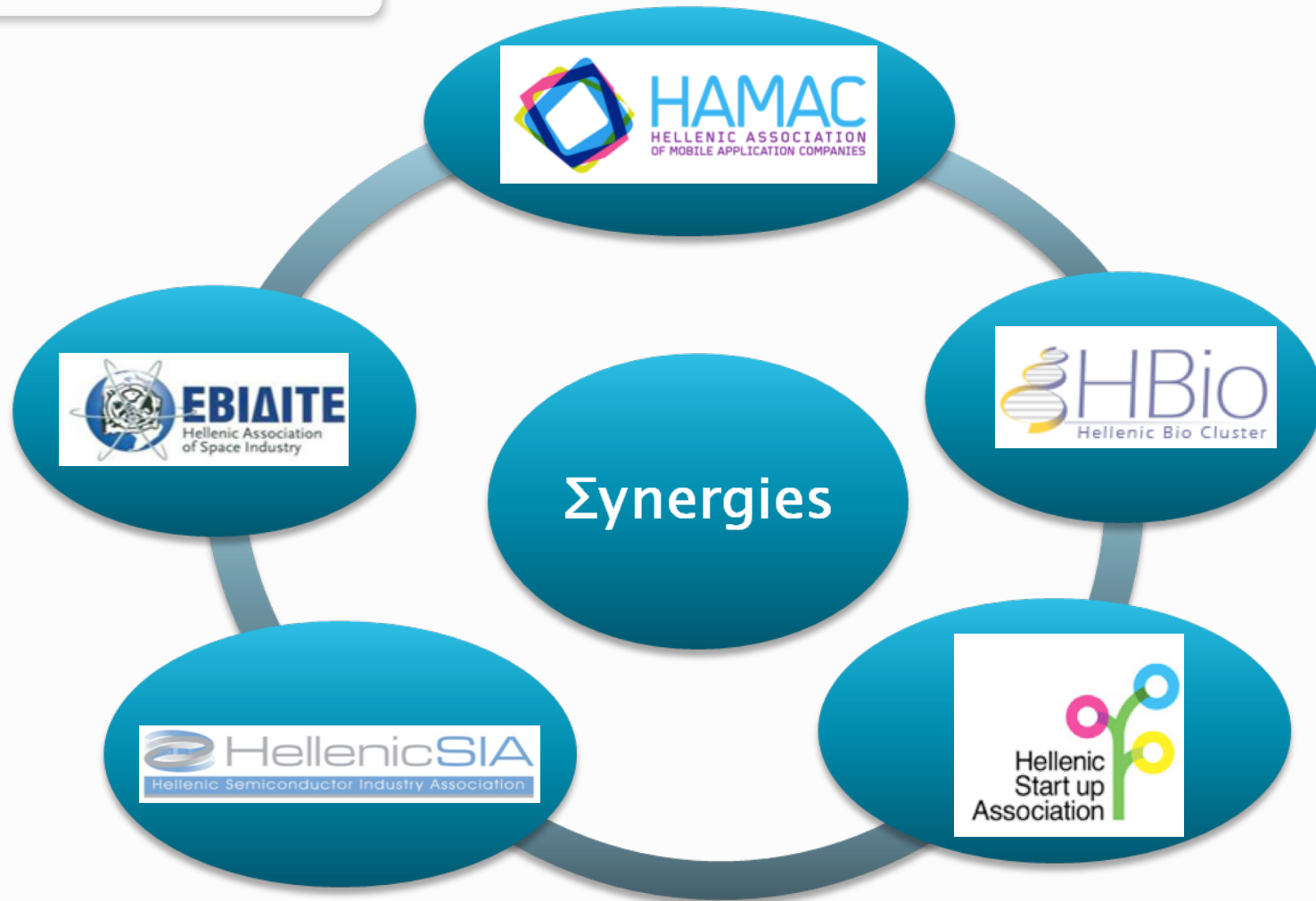


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Σynergies





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Thank you!

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