


Enterprise Computing

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What happens in one second?



5,787
Tweets



18,519
swipes



20,000+
Photos shared



63,000
searches



1,157,407
IBM Z
transactions

When have you used IBM Z?

DAILY

30 billion
transactions

400 million
retail transactions

1 million
hotel nights

ANNUALLY

29 billion
ATM transactions

87%
of all credit card
transactions

90%
of all airline reservations

The backbone of the world's leading businesses



7

**of the top 10
global retailers**



85

**of the top 100
worldwide banks**



4

**out of 5
of the world's
largest airlines**



8 out of 10

**of the world's
largest insurers**

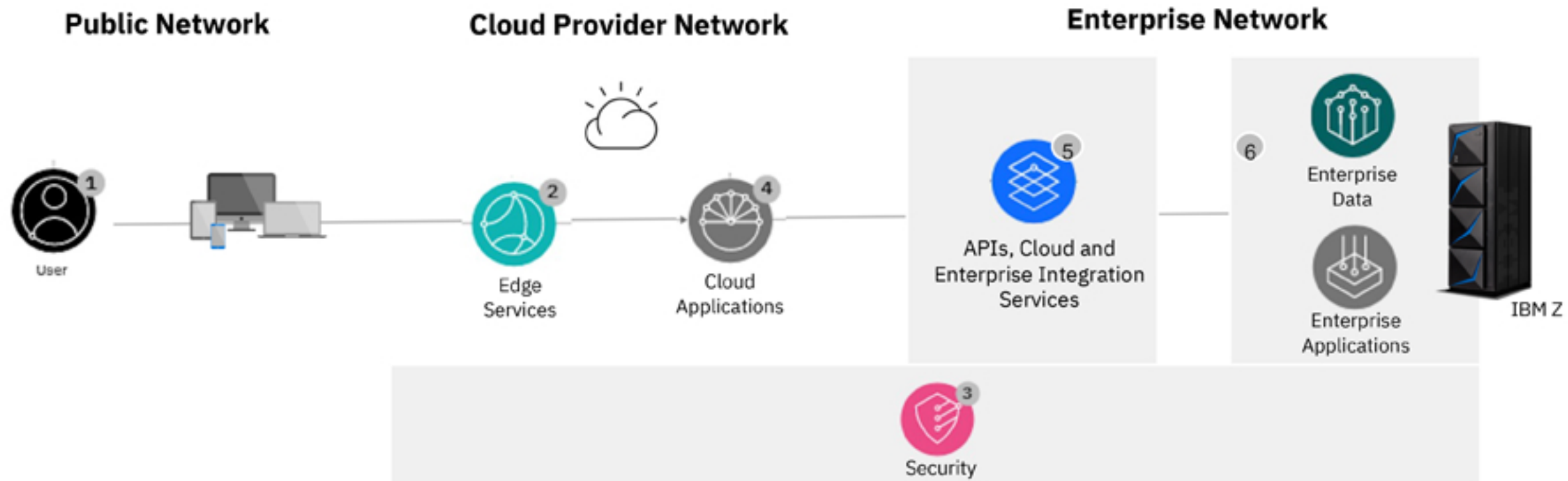
\$666,652,612,597,862

Payments are the Economy
- Gareth Lodge, CELENT

What is Enterprise Computing and IBM Z?

The systems behind the scenes running apps – from networking to infrastructure

68% of the world's production IT workloads run on mainframe systems



Industry transformation is a challenge for business and for IT



Instant payments

Open access

Embedded services



**Digital
transformation**



Regulation

Cyber threats

Data Privacy

Infrastructure is shifting to a cloud first model

Organizations are facing massive changes to their business

4^x

employees were working from home when compared to before COVID (45% of total now, compared to 11% before COVID)

84%

Executives expecting customers to prefer online channels for engagement post-COVID

57%

Customers now seeking environmentally and/or socially conscious products and services

More than

30%

of Germany's post-COVID recovery aid program is tied to green initiatives

Source: See notes section
4X employee figure is based on the latest data collected by IBV in July 2020

Responsible Computing

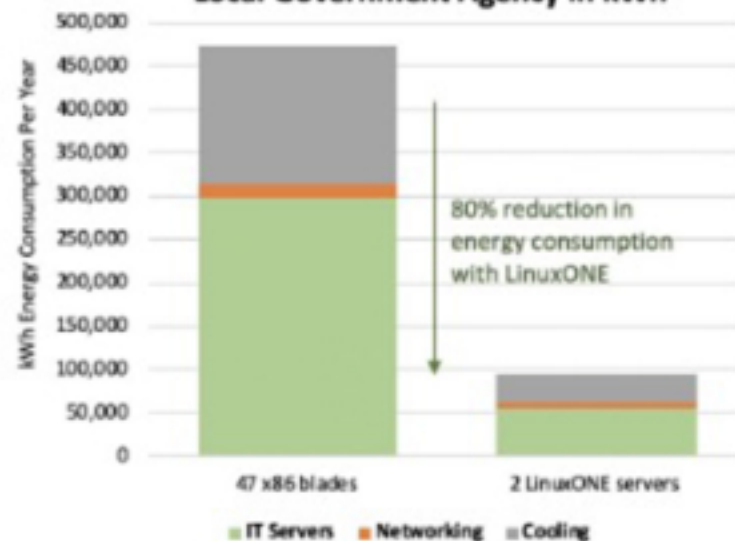


“IBM Europe is changing how **European clients** work by leading them on the journey to **hybrid cloud** and becoming a **responsible, cognitive enterprise.**”

Rashik Parmar

IBM Fellow & Vice President Technology

Annual Energy Consumption for Dutch Local Government Agency in kWh



Responsible use of natural resources

Reduce environmental impact of data centers

Responsible Infrastructure

Reduce energy/computing unit
Reduce precious/rare metal usage
Recycling of tech

Responsible Code

Efficient coding
Open
Secure

Responsible Data Insights

Privacy
Transparency
Authorized data acquisition
Consent for use

Responsible Systems

Ethical systems
Unbiased
Explainable AI

Responsible Impact

Tech for good
Address societal issues
Social mobility

Data Privacy: The Next Big Thing

Simplifying data privacy by improving data protection

Of the **14 Billion** records

breached since 2013

only **4%** were encrypted ¹



\$3.8M

Average cost of a data breach
in 2018 ²



80 +

Data privacy regulations, varying by
industry, location, and geo ³

2/3 of established
companies are leveraging
fintech capabilities for
growth. That number is
expected to increase by

20% in the next three
years

- *Harvard Business Review
Analytic Services*

59%

of companies in the US and UK
say they experienced a data
breach via a third party.

- *2018 Ponemon Study on Global
Megatrends in Cybersecurity*



The EU GDPR is the most
important change in data
privacy regulation in 20 years



Payment Card Industry Data
Security Standard (PCI-DSS)



Health Insurance Portability and
Accountability
Act (HIPAA)



California Consumer Privacy Act

IBM Z and LinuxONE

Elevating protection for Confidential Computing

Dedicated cryptography

Delivered massive secure transaction throughput

Pervasive Encryption

100% protection of data within the system

Data Privacy Passports

100% protection of data wherever it resides



No changes to applications
No impact to service levels
Ultimate risk mitigation for Digital business



Demand for IBM Z and IBM Z Skills

90%

Platform for
Growth and
long-term
applications

67%

X-Large
shops have
majority of
Data on
mainframe

56%

Using
DevOps on
the
mainframe

74%

See ROI in 1
year or less
with DevOps
adoption

63%

Rate Security
and
Compliance
as #1 top
priority

Students pursuing careers in technology are focused on five primary things in a potential career.

Enterprise Computing outperforms other IT roles

Base: US online adults, 18+; 414 IT professionals involved in software development, IT support, enterprise architecture, enterprise computing systems administration/development, data science, etc.
Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, September 2019

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Good salary

● Enterprise computing role ● Other computing role

Average reported starting salary for enterprise computing is **\$70,100** versus \$62,950 of other mixed IT roles.



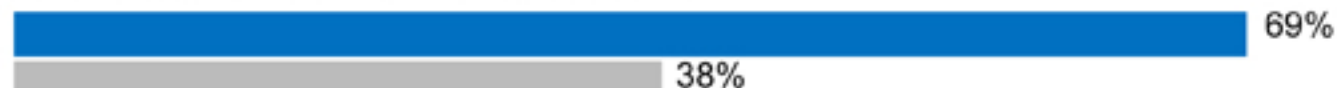
Good work-life balance

A good work-life balance (*% rating 8, 9, or 10 out of 10*)



Ability to make a social impact

Social impact, for example, the ability to contribute to open source, social, or community groups, with your technical skills



Working on something that aligns with primary interests in technology

Opportunity to work with leading-edge tech



Job security/role versatility

Nearly **90%** of professionals in enterprise computing careers agree the job market for their skill set is growing, and **75%** believe there is a shortage (i.e., high demand) for their skill.

Enterprise Computing enables you to work in a wide variety of areas....

Hybrid Cloud



Within 5 years, more than 50%+ of U.S. P&C insurers will put new core systems in the cloud.

Analytics



Insurers are expected to spend approximately \$8.3B, or 8% of their overall spending, with big data and analytics vendors in 2019, growing to \$11.5B in 2022

Blockchain



Insurance Blockchain market is expected to grow to \$1.4B by 2023, at a CAGR of 85%

Insurtech



VC investments almost doubled in last two years, 1.7B in 2016 to \$3B in 2018

Artificial Intelligence



AI spend from spend \$1.1B, in 2019 to \$2.6B in 2022

Internet of Things



Insurance industry is expected to spend \$7.7B on IoT in 2019, growing to \$12B in 2022.

Tech for Good: Start learning today and make an impact

Master the Mainframe Coding Contest

The Master the Mainframe Competition has teamed up with the UN World Food Programme app, @ShareTheMeal to fight hunger!



Just 1 hour of learning feeds 2 children for a day via our team in #ShareTheMeal



masterthemainframe.com