Türkiye’nin Dijital Dönüşümü ve Fırsatlar

Tolga Ulutaş
Agenda

Digital is changing the world

Accenture Digitization Index Turkey Results

Opportunities
“Digital” is used to describe many things
Digital is changing all aspects of our lives

- Shopping
- Entertainment
- Education
- Exercise
- Travel
- Payments
Digital is massive

In one minute,
2.4 billion people connected to the internet interact:

- 38,000+ photos shared
- 3,100,000 likes on Facebook
- 4,000,000+ searches on Google
- 277,000+ snapchats received
- 347,000+ tweets
- 3,500+ pins
- 100+ hours of video uploaded
- $275,000+ transactions (USD)

Source: Company websites
Digital is scary

World’s Largest Data Breaches

Millions of Records Stolen

Source: informationisbeautiful.com, World’s Biggest Data Breaches.
Soon, there will be an **app for everything**

Apps are easy to create and distribute to address specific intents.
It’s all about **devices**

There is an explosion of form factors:
The internet of things is a complex ecosystem

**Devices**
- 25B devices expected by 2020

**Networks**
- 4.9B people accessing 4G-LTE networks by 2018

**APIs**
- 80% Fortune 1000 could offer public APIs by end of 2016

**Apps**
- 4.4B total number of app users by 2017

**Data**
- 15.9EB Exabytes of mobile data traffic per month by 2018

- **Motion**
- **Social**
- **Search**
- **Marketing**
- **Billing**
- **Transaction data**
- **Field data**
- **Inventory data**
- **Performance data**
- **Augmented Reality**
- **Voice Recognition**
- **Gesture Tracking**
- **Touch Interfaces**
IoT will touch every business within the next three years
It’s all about **data** and how you **leverage it**

**Number of Objects Stored in Amazon Web Services**
2007-2013, Billions

“It took us six years, or until 2012, to get to 1 trillion objects stored. Then it took us one more year to get to 2 trillion. So that’s an indication of the speed of growth. To my eyes, that it only took a year to get to 2 trillion, it looks like the onset of a hockey stick.”

*Werner Vogels, CTO, Amazon*

<table>
<thead>
<tr>
<th>Year</th>
<th>Objects Stored (Billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>5</td>
</tr>
<tr>
<td>2008</td>
<td>16</td>
</tr>
<tr>
<td>2009</td>
<td>52</td>
</tr>
<tr>
<td>2010</td>
<td>100</td>
</tr>
<tr>
<td>2011</td>
<td>339</td>
</tr>
<tr>
<td>2012</td>
<td>1,000</td>
</tr>
<tr>
<td>2013</td>
<td>2,000</td>
</tr>
</tbody>
</table>

CAGR ‘07-’13 171%
The journey to become a digital business

Defend

Differentiate

Disrupt

Business benefits:
- Consumer Expectations
- Business transformation
- Technology platforms

Time
Our view of digital

Digital Customers, Channels & Markets

Digital Enterprise
We're helping Visa launch connected commerce. 
So your car is now your card.

High performance. Delivered.

Strategy | Consulting | Digital | Technology | Operations
Our mobile expertise let Ducati riders order their perfect bike. And go from daydream to reality faster than ever.
Bringing together private sector and academic world, the study aims to create a serious awareness in digitization, to put forth new areas of development by determining the current situation of prominent industries in Turkey in digital transformation and to support Turkey’s growth and development by contributing to the country’s digital transformation.
Accenture Digitization Index – Turkey

- Digital Strategy
  - Trend
  - Objective

- Digital Services
  - Product & Solution
  - Service
  - Interaction
  - Sales Functionality
  - Service Functionality

- Digital Enablement
  - Operations & Processes
  - Resources & Organization
  - Workflow
Accenture Digitization Index – Turkey

60%

Average Accenture Digitization Index score in Turkey
Industry Scores

- Financial Services: 76%
- Retail: 72%
- Services: 71%
- Vehicle Manufacturing: 70%
- Other Manufacturing: 67%
- Transportation & Logistics: 64%
- Wholesales: 63%
- Insurance: 60%
- Information & Communication Equipment Wholesales: 59%
- Energy: 56%
- Vehicle Distributors & Retailers: 53%
- Food Manufacturing: 51%
- Electronics & High Tech Manufacturing: 51%
- Non-metals Minerals Product Manufacturing: 47%
- Metal Manufacturing: 45%
- Construction: 41%
- Chemicals: 41%

Average: 60%
<table>
<thead>
<tr>
<th>Industry Cluster</th>
<th>Average ADI Score of the Industry Cluster</th>
<th>Industry Leaders</th>
<th>ADI Score of Industry Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Services</td>
<td>76%</td>
<td>Türkiye Garanti Bankası A.Ş.*</td>
<td>93%</td>
</tr>
<tr>
<td>Retail</td>
<td>72%</td>
<td>Migros Ticaret A.Ş.*</td>
<td>84%</td>
</tr>
<tr>
<td>Services</td>
<td>71%</td>
<td>Acibadem Sağlık Hizmetleri ve Ticaret A.Ş.*</td>
<td>83%</td>
</tr>
<tr>
<td>Vehicle Manufacturing</td>
<td>70%</td>
<td>Ford Otomotiv Sanayi A.Ş.</td>
<td>77%</td>
</tr>
<tr>
<td>Other Manufacturing</td>
<td>67%</td>
<td>Brisa Bridgestone Sabancı Lastik Sanayi ve Ticaret A.Ş.*</td>
<td>88%</td>
</tr>
<tr>
<td>Transportation &amp; Logistics</td>
<td>64%</td>
<td>Pegasus Hava Taşınmacılığı A.Ş.</td>
<td>79%</td>
</tr>
<tr>
<td>Wholesales</td>
<td>63%</td>
<td>BSH Ev Aletleri Sanayi ve Ticaret A.Ş.*</td>
<td>83%</td>
</tr>
<tr>
<td>Insurance</td>
<td>60%</td>
<td>Allianz Sigorta A.Ş.</td>
<td>76%</td>
</tr>
<tr>
<td>Information &amp; Communication Equipment Wholesales</td>
<td>59%</td>
<td>Penta Teknoloji Ürünleri Dağıtım Ticaret A.Ş.</td>
<td>76%</td>
</tr>
<tr>
<td>Energy</td>
<td>56%</td>
<td>Enerjisa Enerji A.Ş.</td>
<td>71%</td>
</tr>
<tr>
<td>Vehicle Distributors &amp; Retailers</td>
<td>53%</td>
<td>Toyota Türkiye Pazarlama ve Satış A.Ş.*</td>
<td>87%</td>
</tr>
<tr>
<td>Food Manufacturing</td>
<td>51%</td>
<td>Unilever Sanayi ve Ticaret Türk A.Ş.</td>
<td>75%</td>
</tr>
<tr>
<td>Electronics &amp; High Tech Manufacturing</td>
<td>51%</td>
<td>Vestel Elektronik Sanayi ve Ticaret A.Ş.</td>
<td>66%</td>
</tr>
<tr>
<td>Non-metals Manufacturing</td>
<td>47%</td>
<td>Kaleseramik, Çanakkale Kalebodur Seramik Sanayi A.Ş.</td>
<td>75%</td>
</tr>
<tr>
<td>Metals Manufacturing</td>
<td>45%</td>
<td>Borusan Mannesmann Boru Sanayi ve Ticaret A.Ş.</td>
<td>65%</td>
</tr>
<tr>
<td>Construction</td>
<td>41%</td>
<td>Akdeniz İnşaat ve Eğitim Hizmetleri A.Ş.</td>
<td>58%</td>
</tr>
<tr>
<td>Chemicals</td>
<td>41%</td>
<td>Petkim Petrokimya Holding A.Ş.</td>
<td>52%</td>
</tr>
</tbody>
</table>
Accenture Digitization Index score (out of a maximum score of 100 points) is associated on average with a 1.5% additional EBIT margin for a company. This analysis indicates a positive and statistically significant relationship between Accenture Digitization Index and the profitability of a company.
Recommendations for Turkish Companies:

• Understand where you are and develop your digitization strategy
• Build a digital operating model and ensure agility
• Ensure top management’s sponsorship
• Develop digital skills
• Focus on the business value
• Be design and data driven
• Leverage digital technologies and improve information security
Opportunities

2015 global economy
The 2015 economy as a share of gross domestic product

22.5%
Digital economy: $19,159bn
Non-digital: $65,991bn
77.5%

2020 global economy
Forecast growth of the digital economy

25.0%
Digital economy: $24,615bn
Non-digital: $73,875bn
75.0%
Opportunities

Income from existing business model

Income from digital business model
Q&A