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IT Spending Forecast, 1Q22 Update: The Russian Invasion of Ukraine

John Lovelock

Distinguished VP Analyst, Chief Forecaster

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Polling Question 1 of 1

What is the status of your corporation's activity in Russia

A. **We don't have operations in Russia**
B. **We have withdrawn from Russia**
C. **We have suspended operations in Russia**
D. **We have scaled back operations in Russia**
E. **We are continuing business-as-usual in Russia**

How to participate in our polling

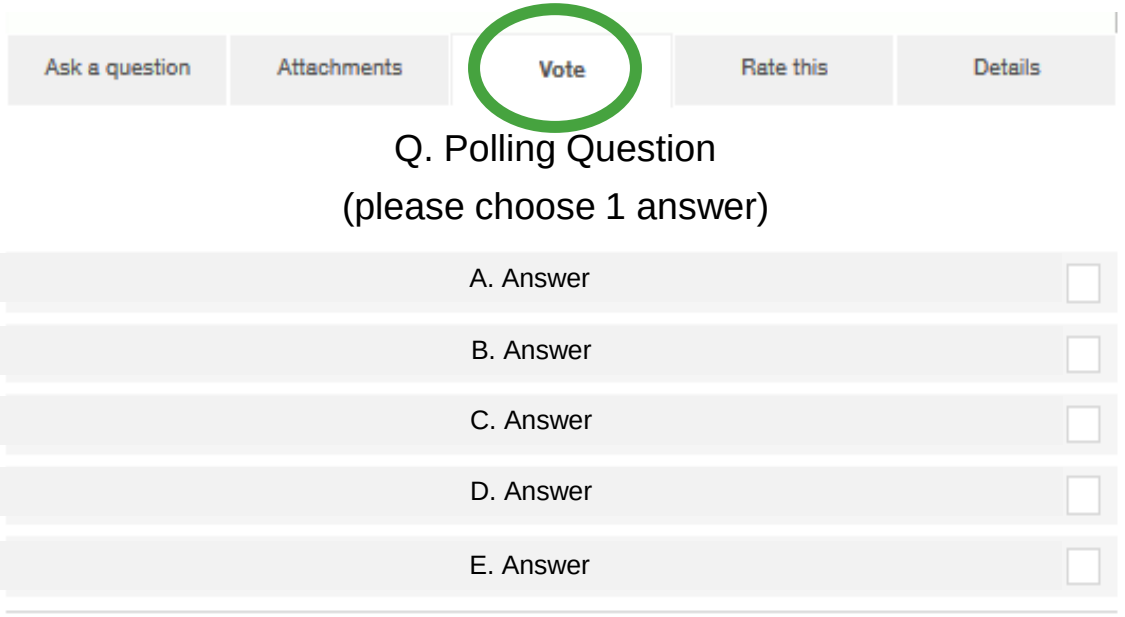
If you are in full screen mode – click Esc

The poll question is on the "Vote" tab.

Please click the box to make your selection.

Upon voting you will see the results.

Thank you!



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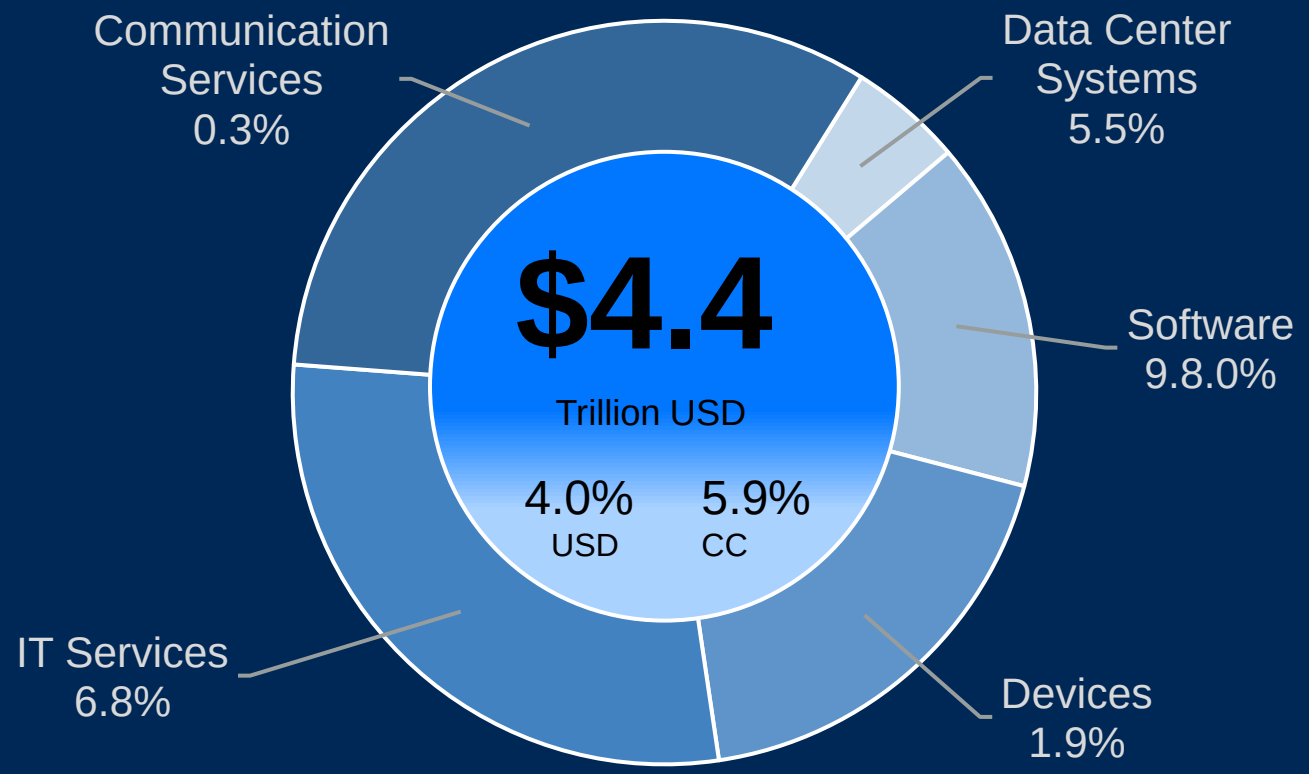
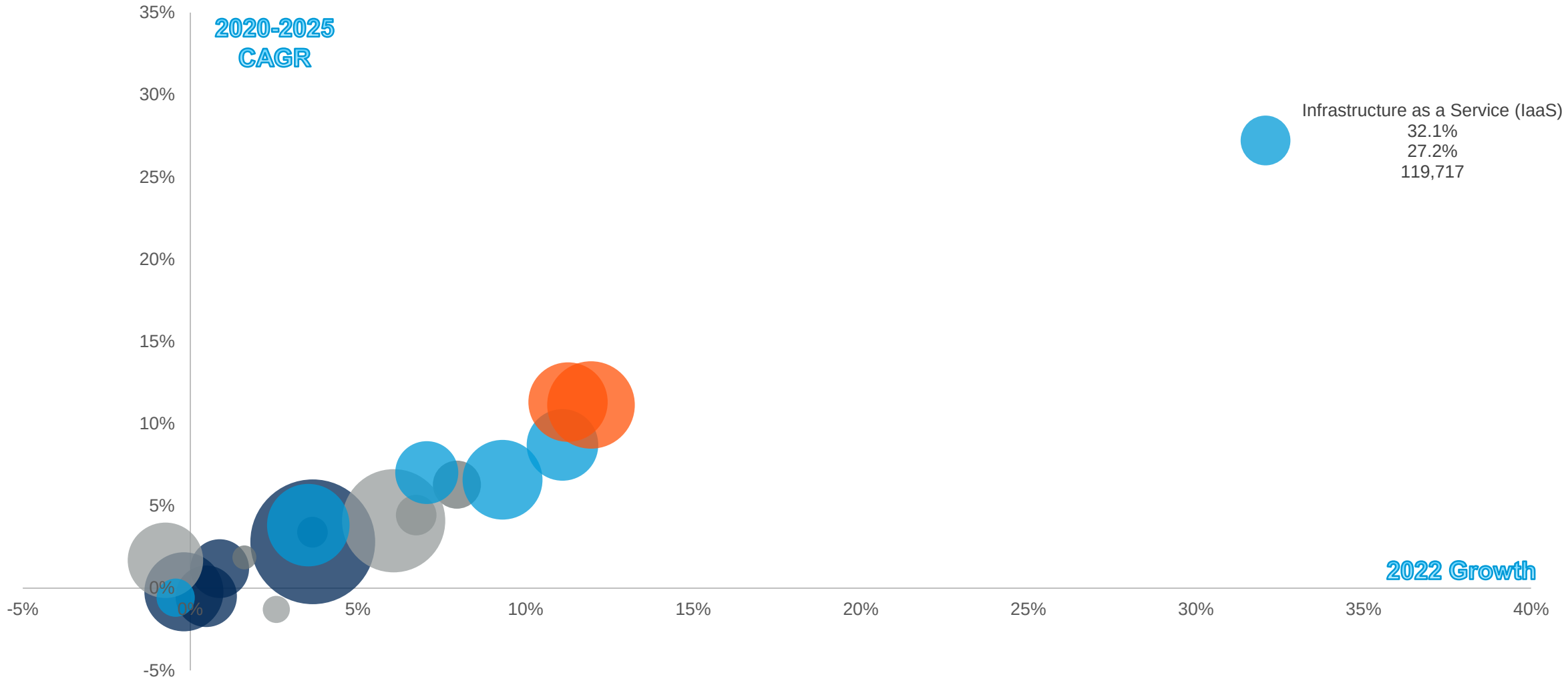
Global IT Spending & Growth for 2022



Source: “Gartner Market Databook, 1Q22 Update”, October 2021

IT Databook Market Growth



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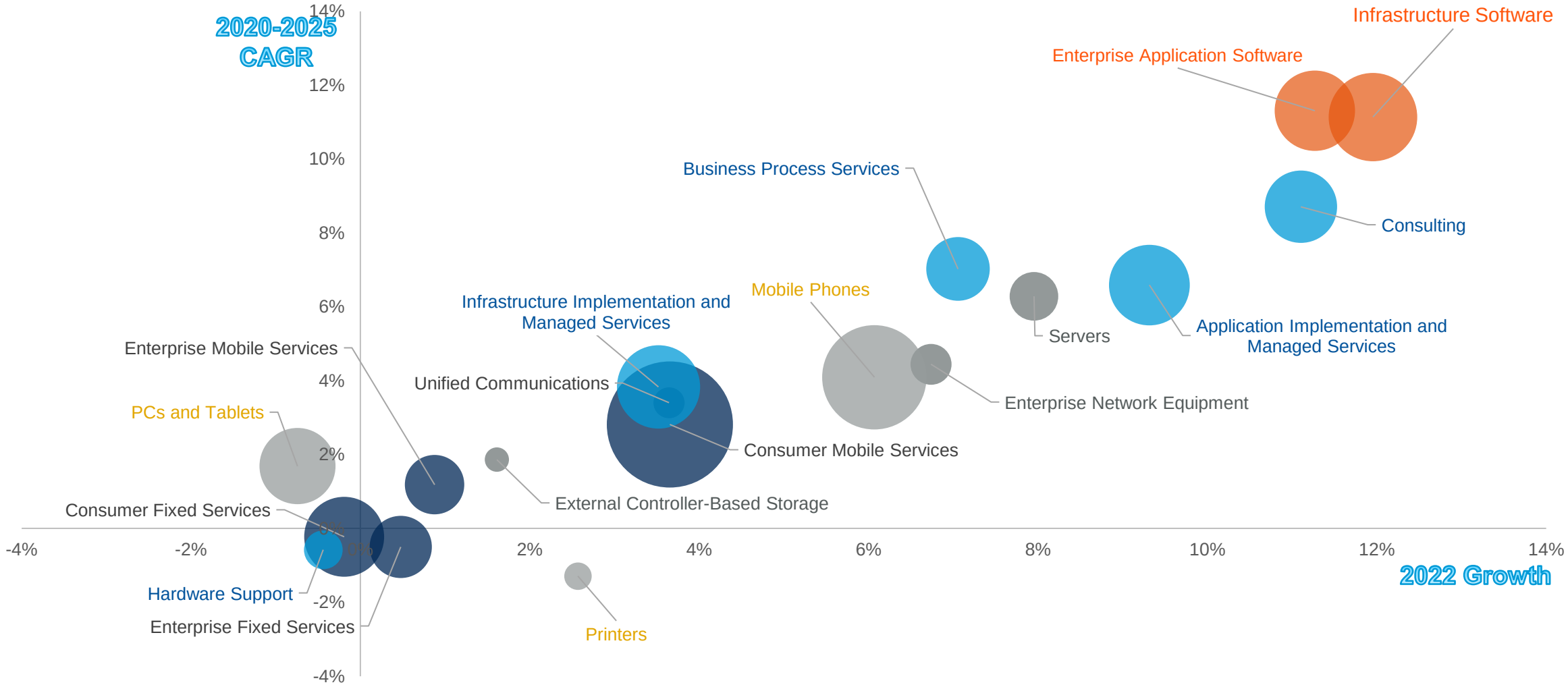
IT Databook Market Growth



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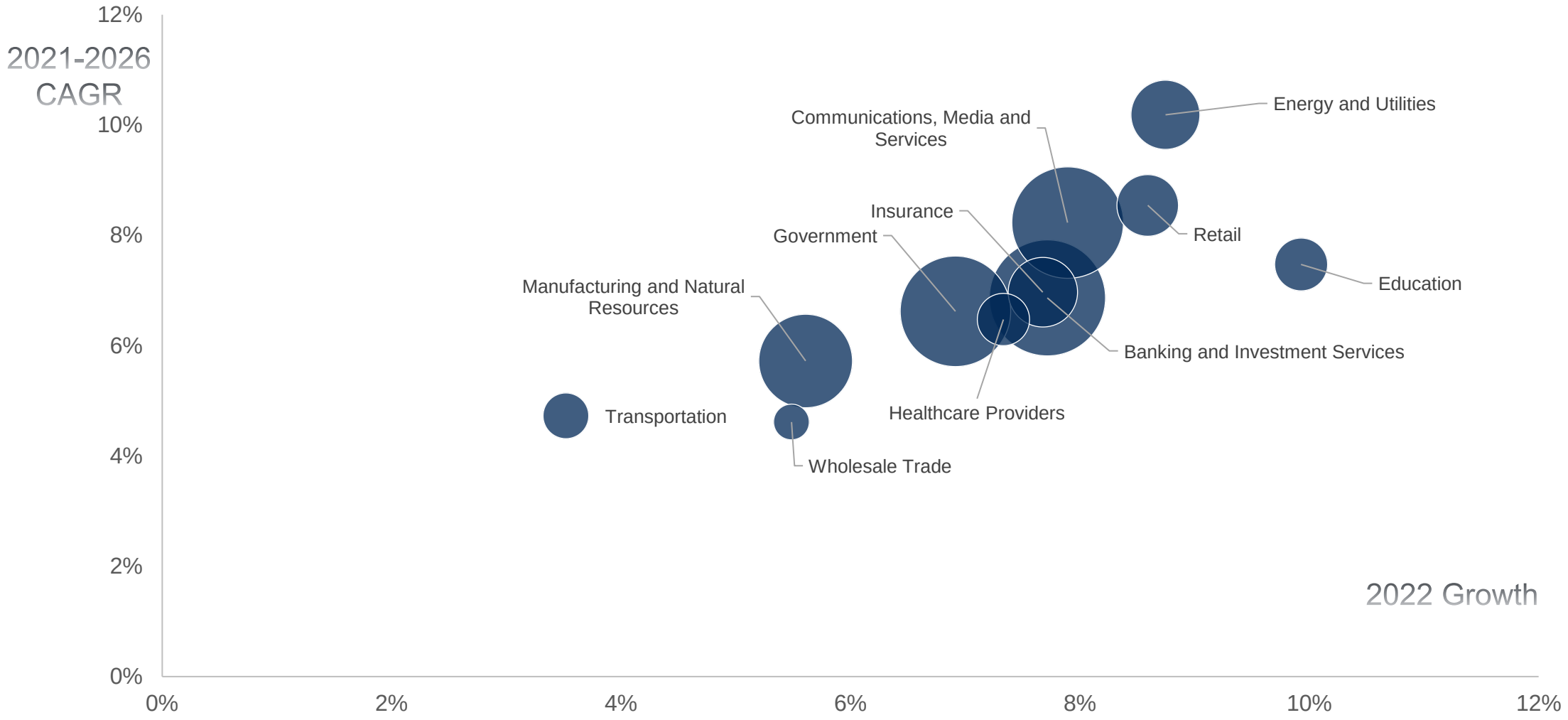
IT Spending by Vertical Industry



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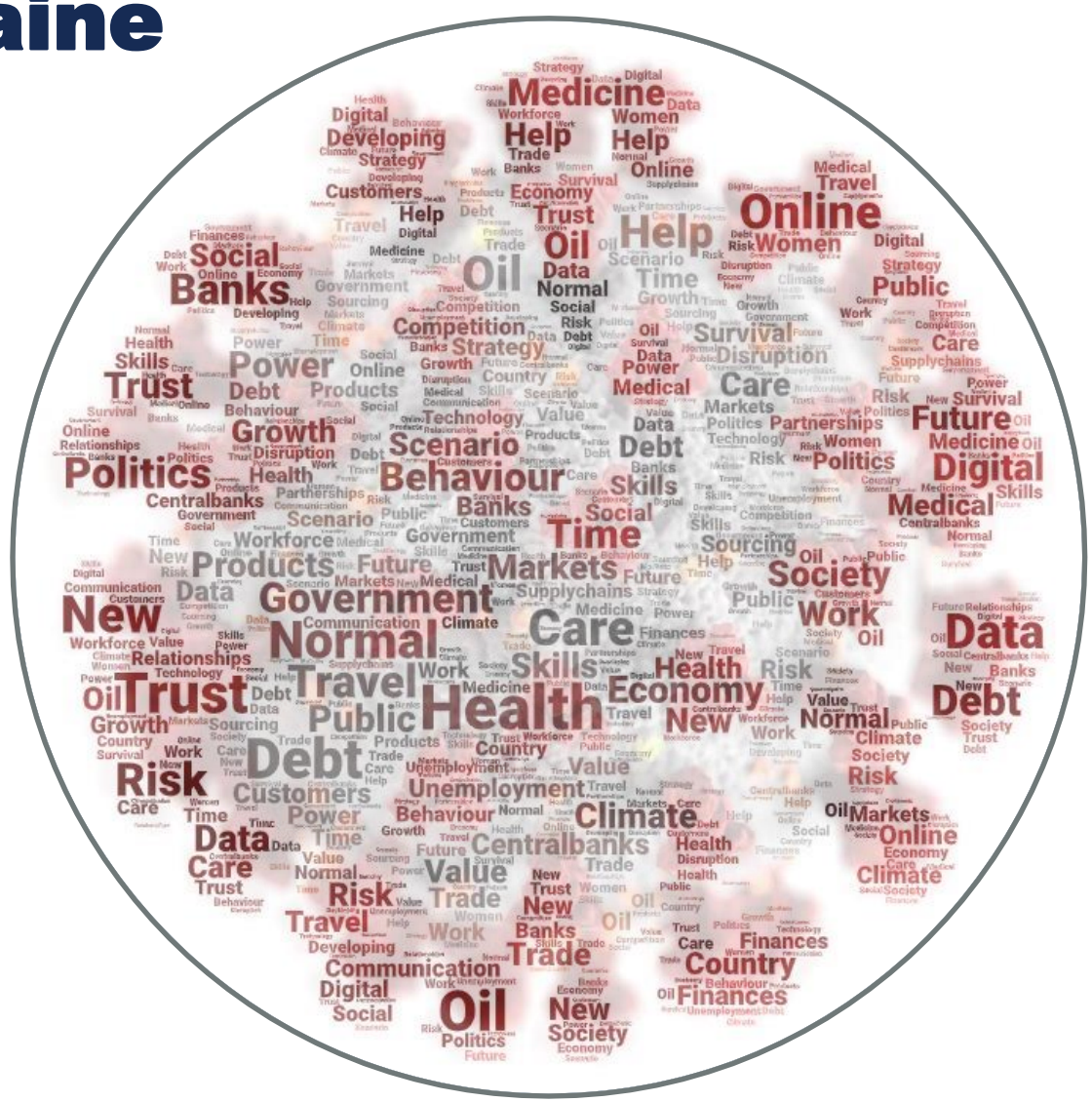
Russia’s Invasion of Ukraine

Will make 2022 the Noisiest Year on Record



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No Direct Impact

Source: 1Q22 Databook

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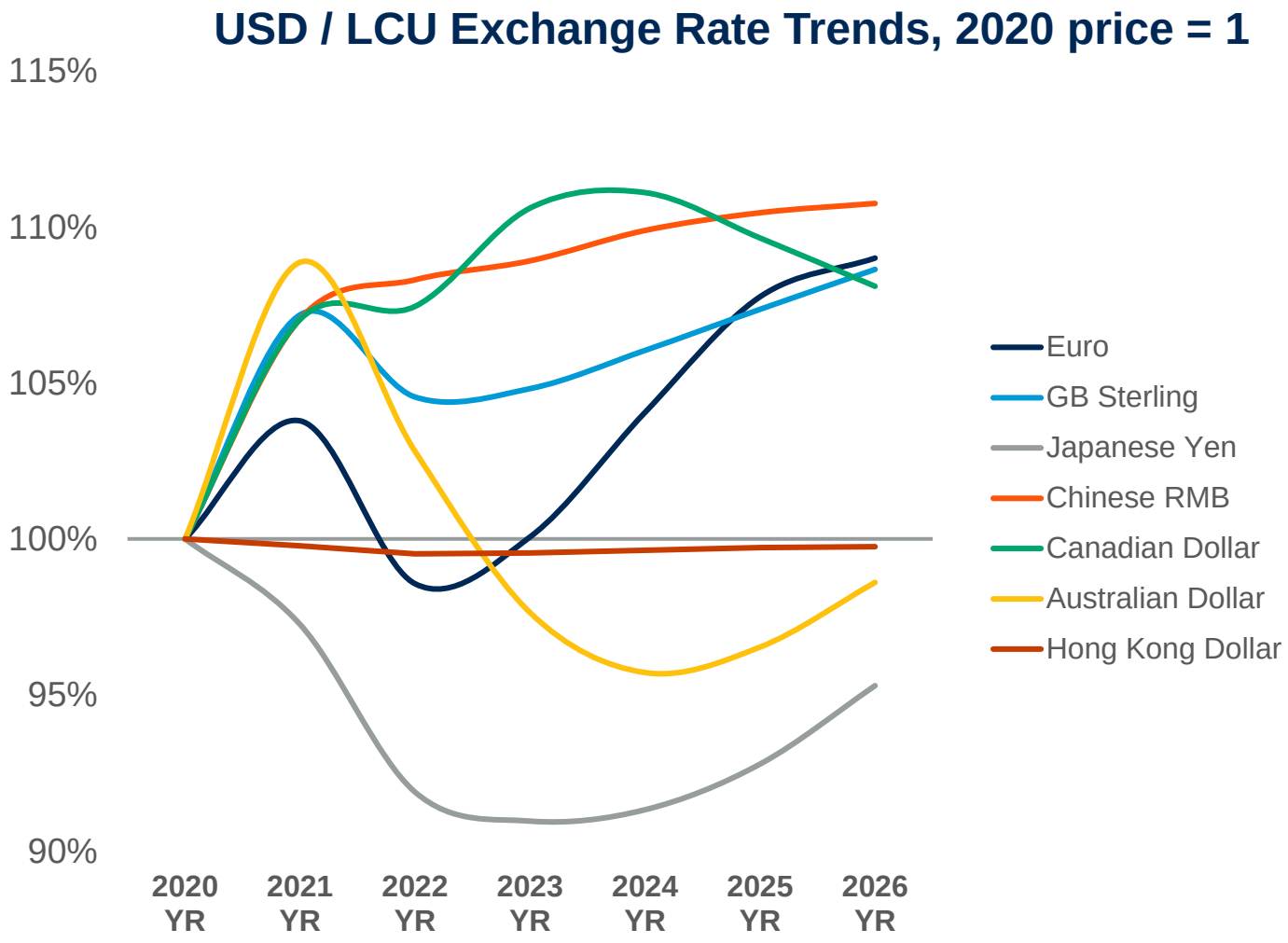
FX overview: higher volitivity through 2025



1Q22 USD headwind: ≈2% for 2022 Tailwind 0.5% for 5Y CAGR

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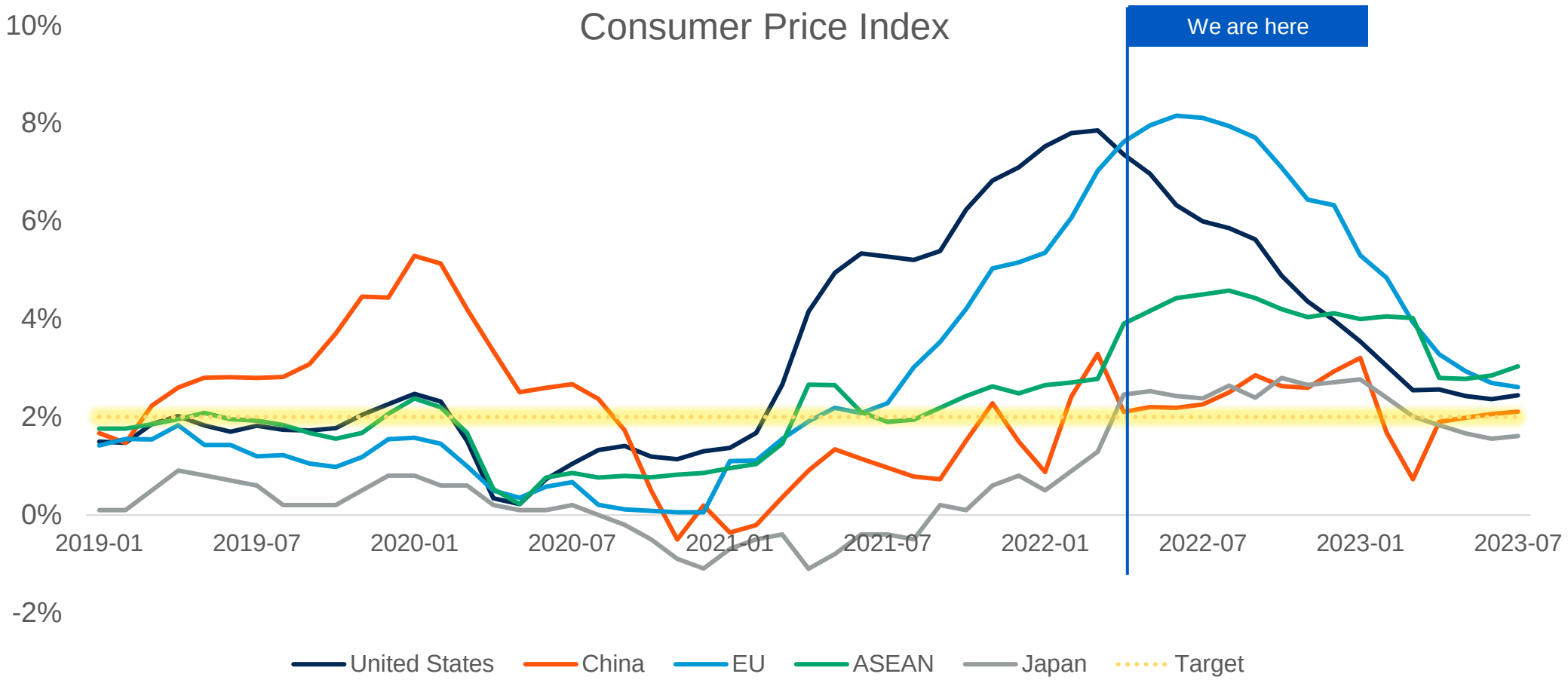
Country and Region Inflation Levels



Source: IHS Markit, OECD

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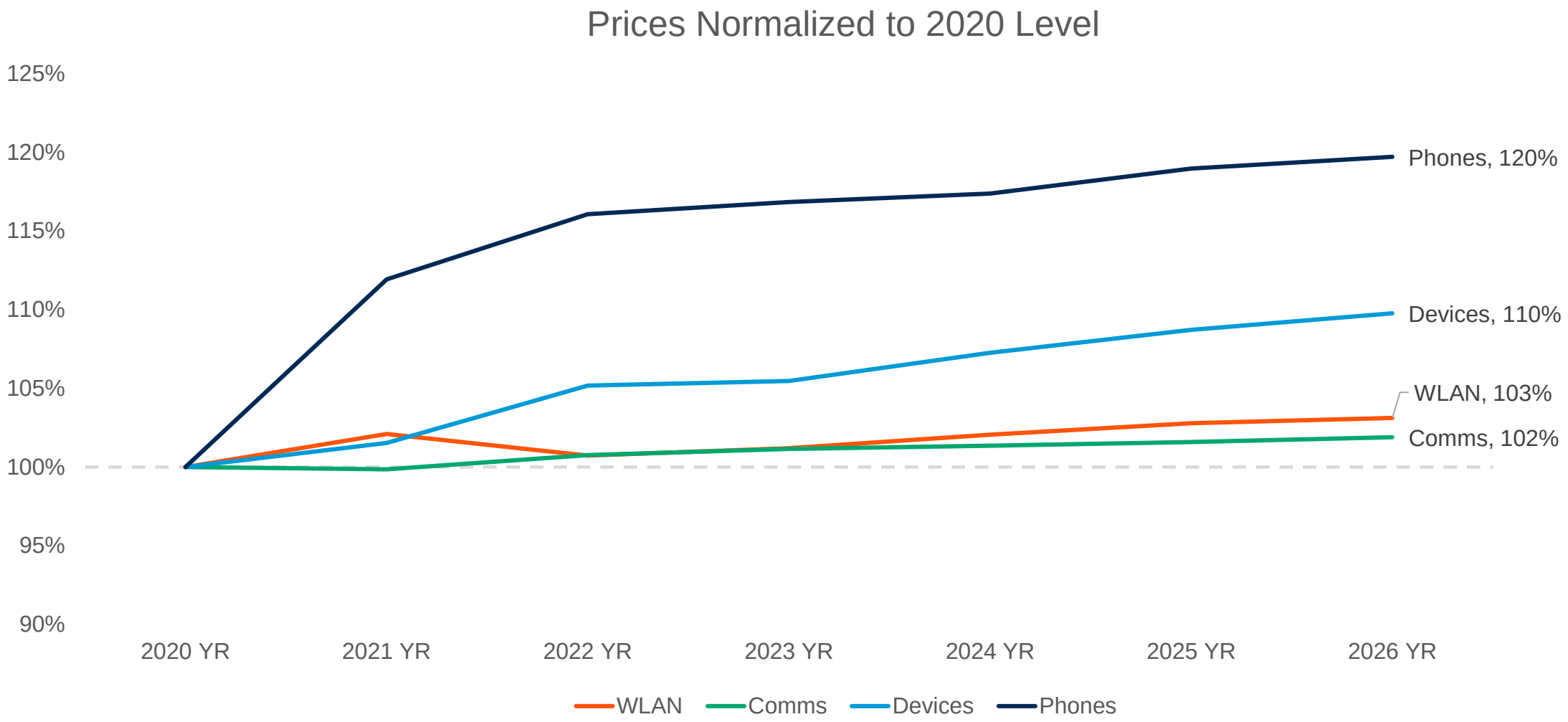
Global IT Price Inflation



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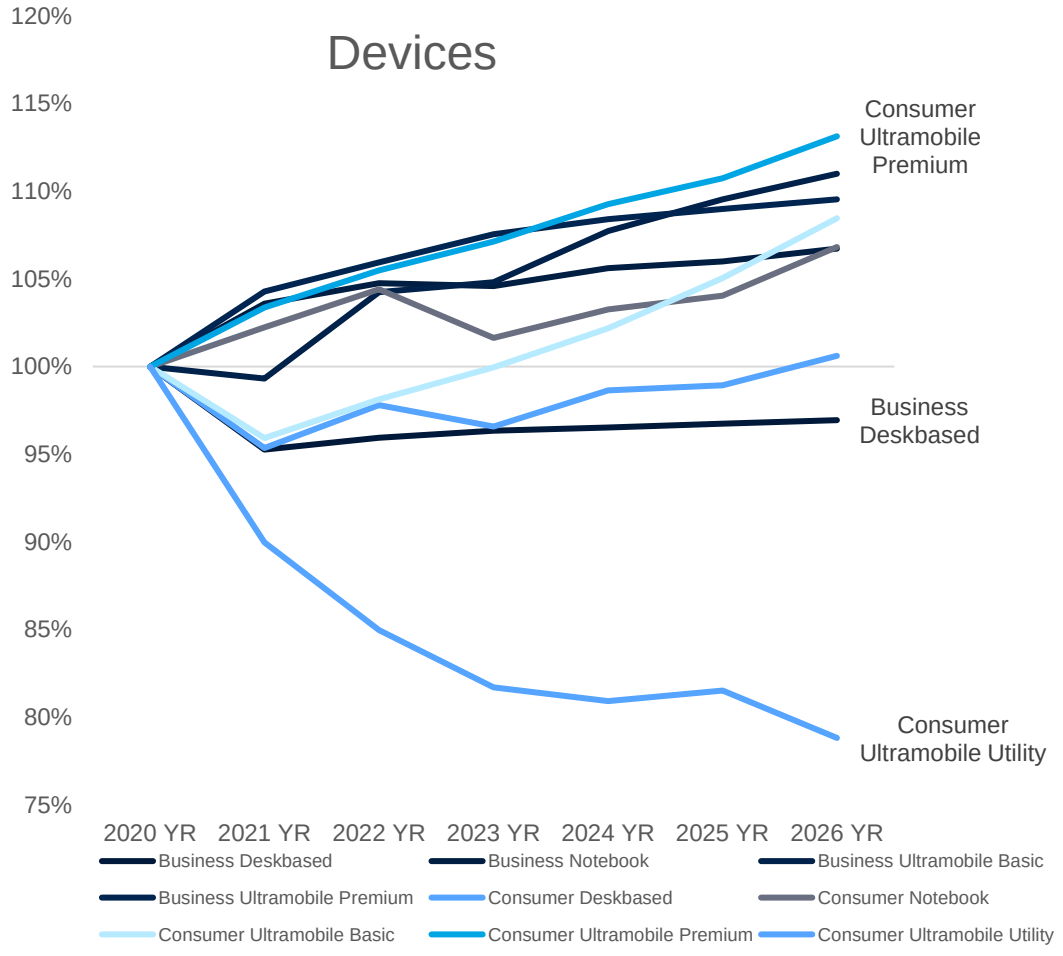
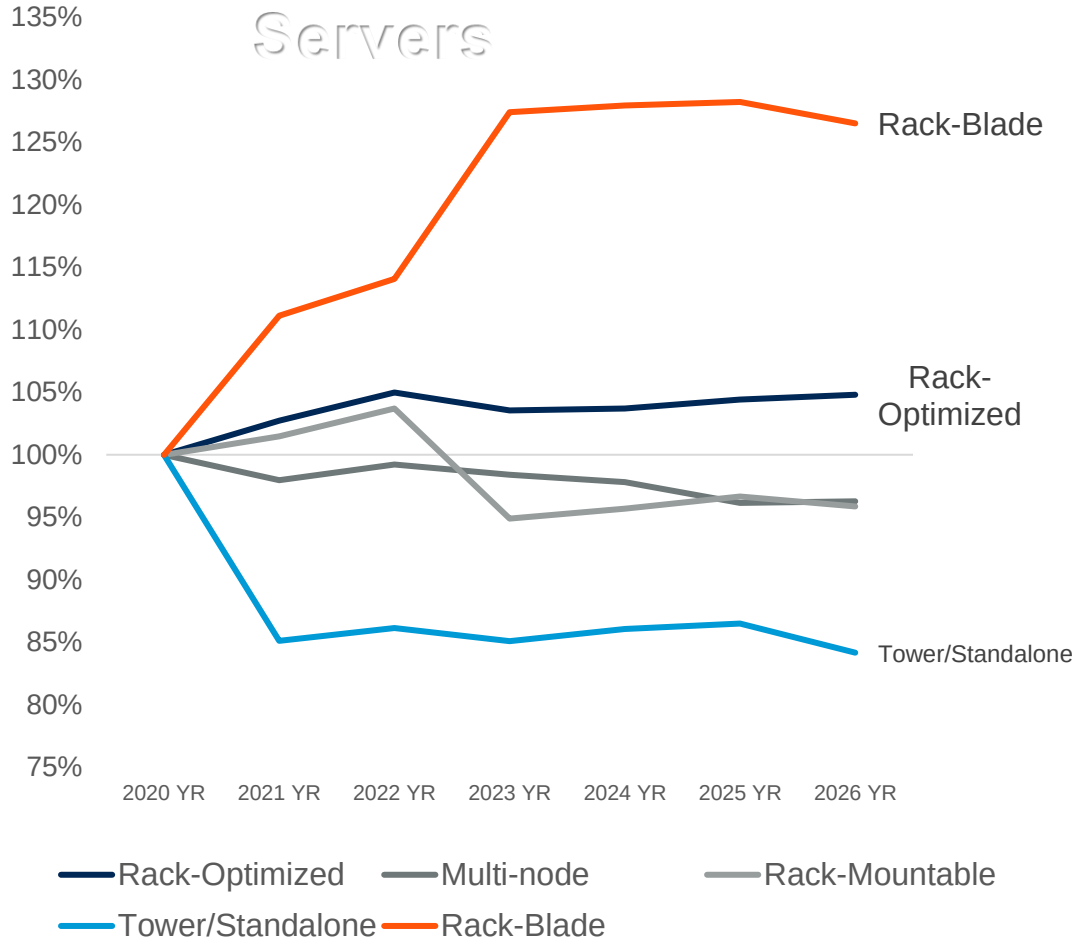
Average Sales Price Change from 2020





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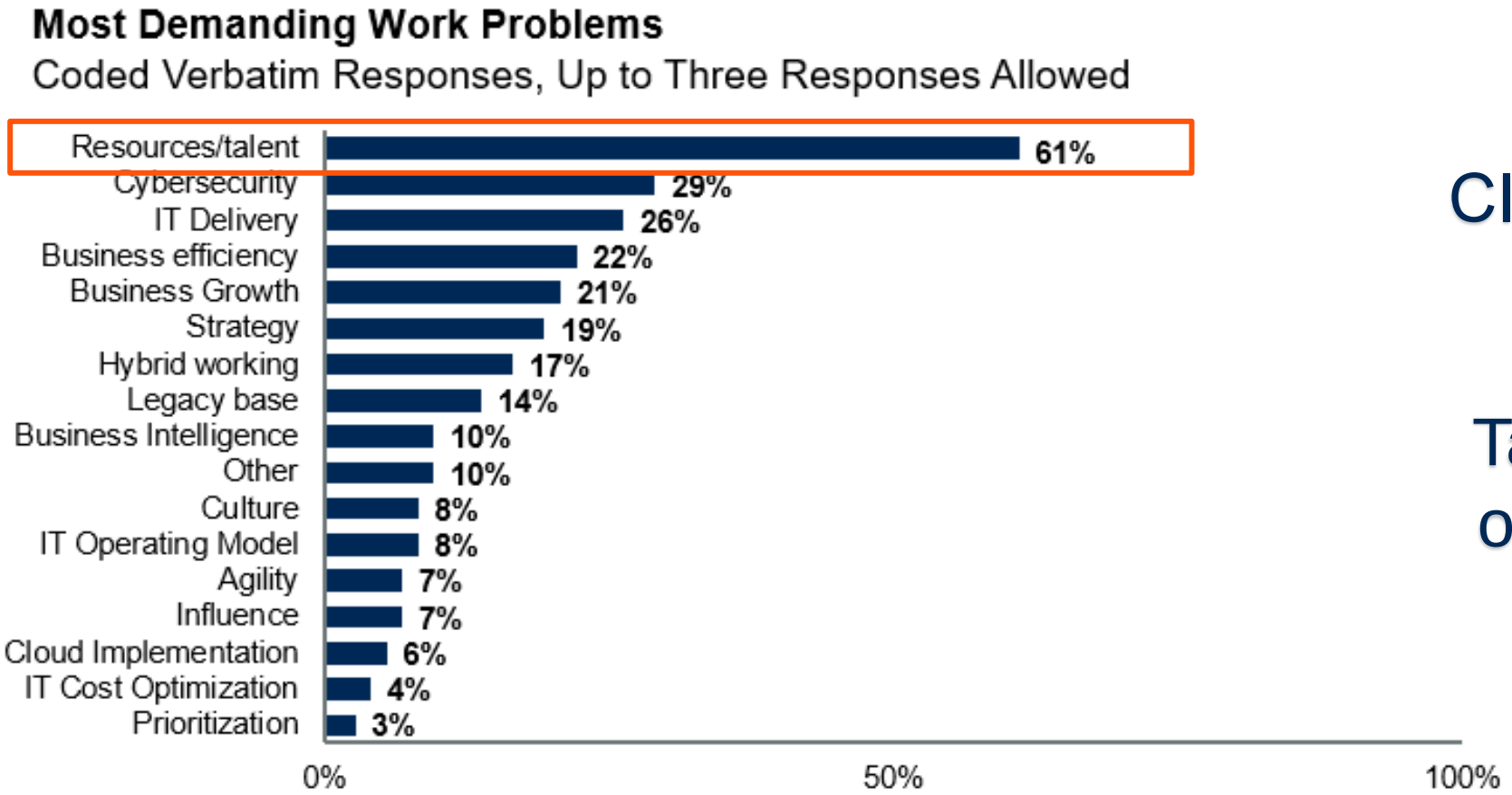
…Leaving CIOs Struggling w/ Resourcing/Talent…



n =72 members of Gartner's CIO Research Circle

Q. Thinking about the next 18 months, what are your top three most demanding work problems?

Source: 2022 Gartner CIO Research Circle January Poll

ID:

CIO's have not lost any problems

Talent is now the overwhelming #1

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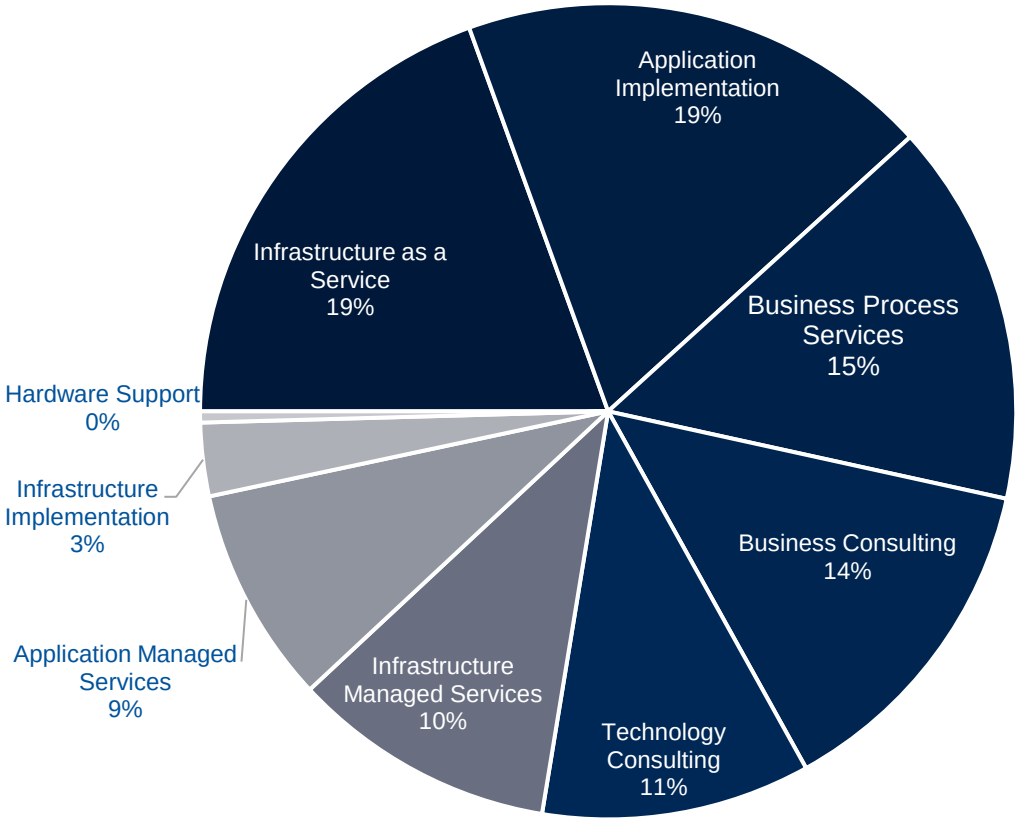
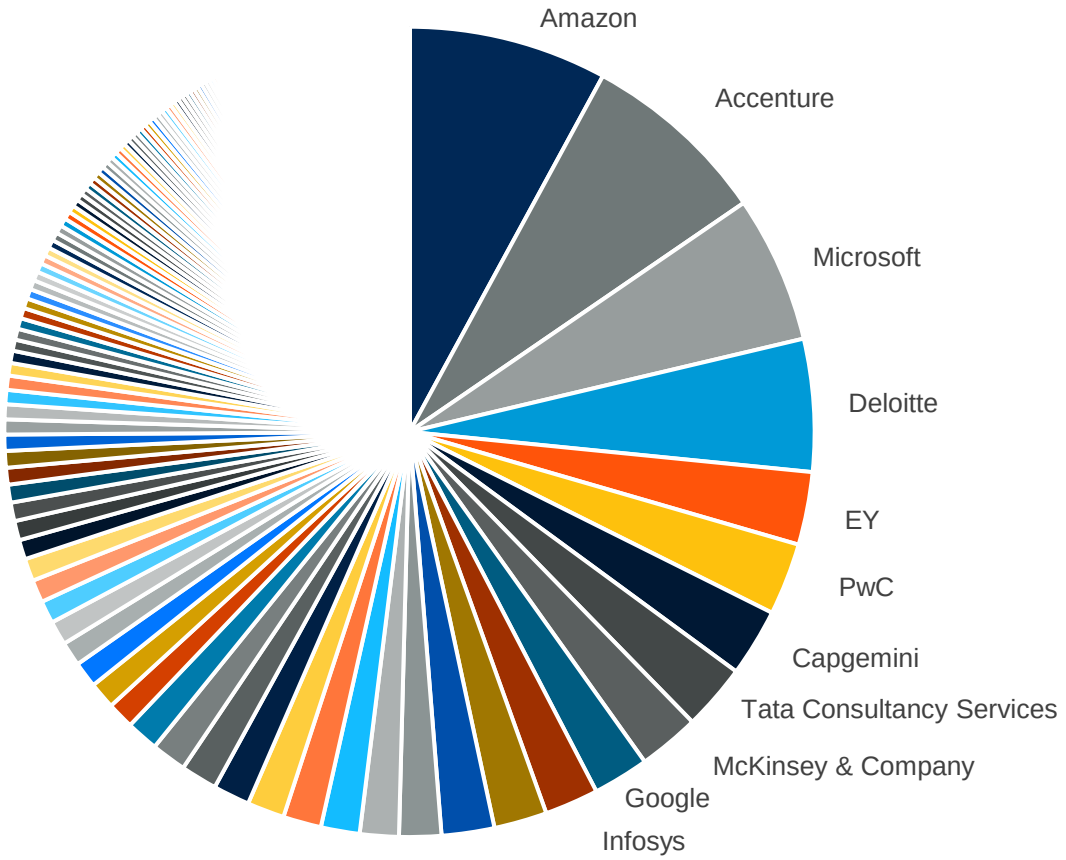
IT Services Spend increased $137B in 2021

Even Spread by Markets



10 Vendors Accrued 40%



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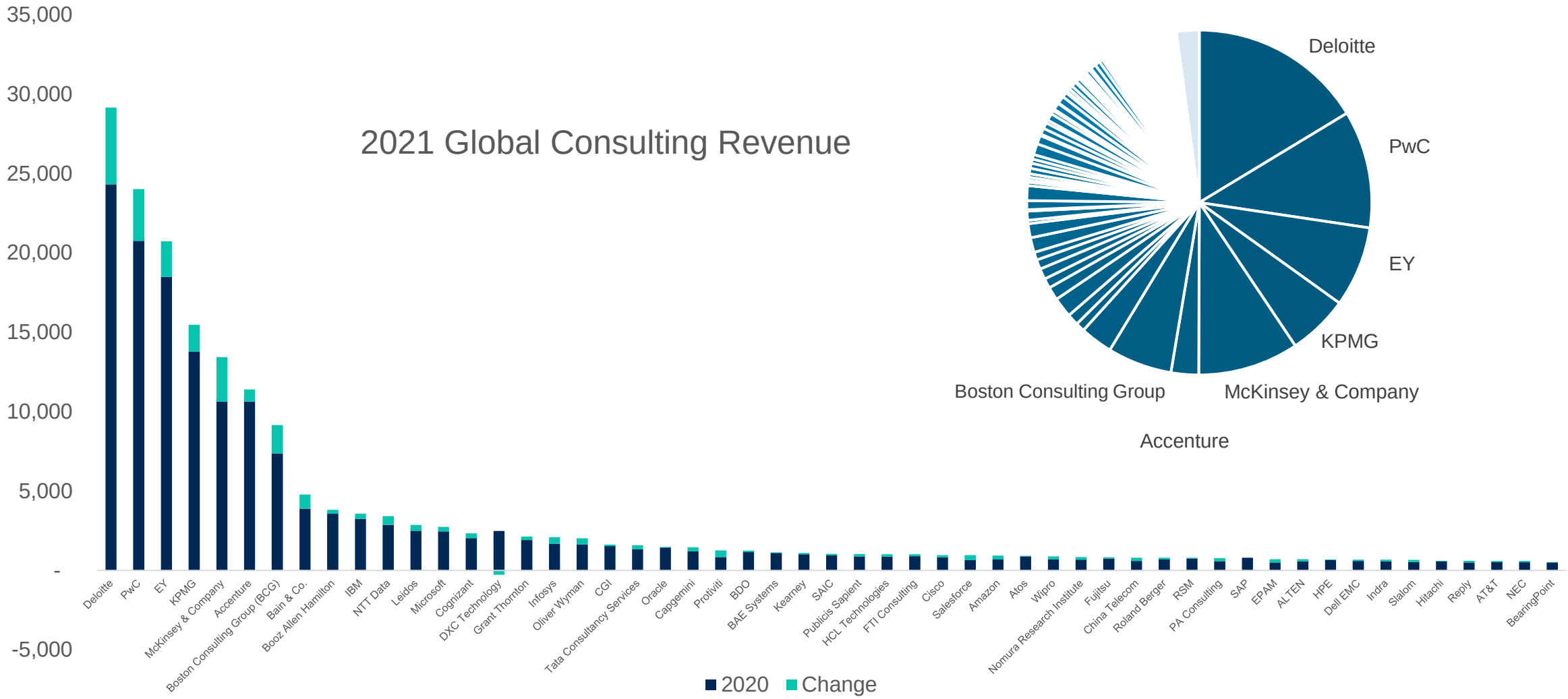
57% of Consulting Spending Increase to top 7 Vendors



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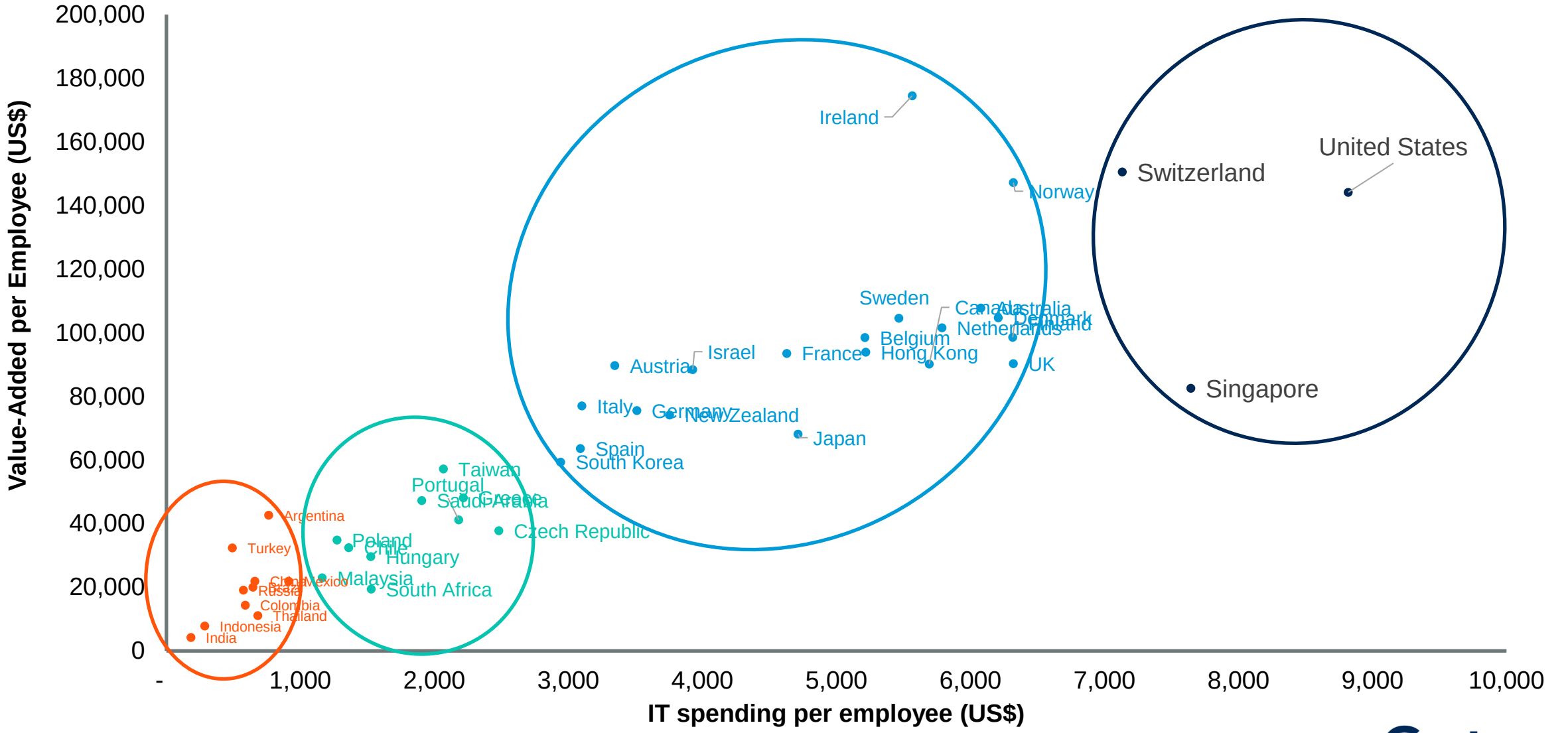
Country Level IT Intensity



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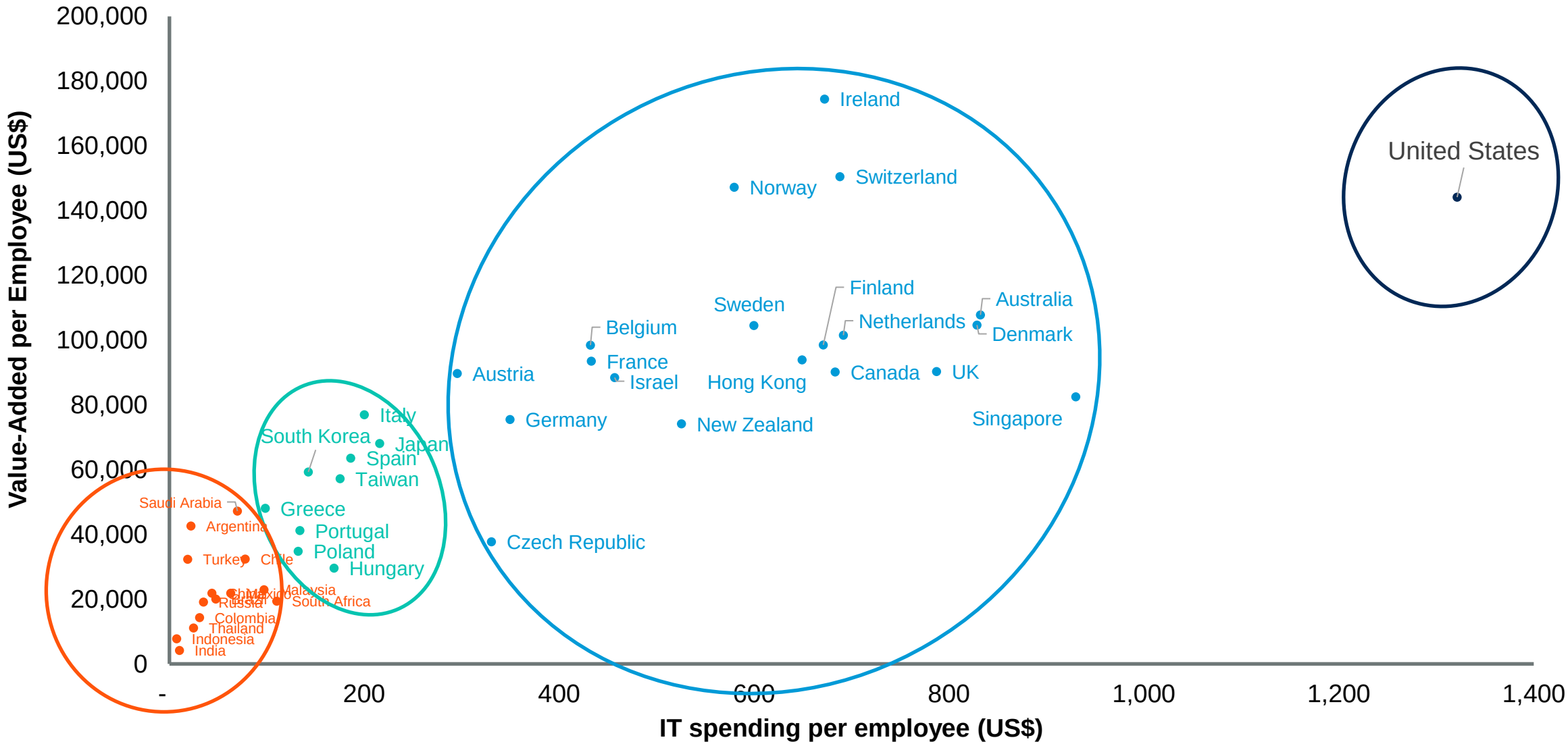
Country Level Cloud Intensity



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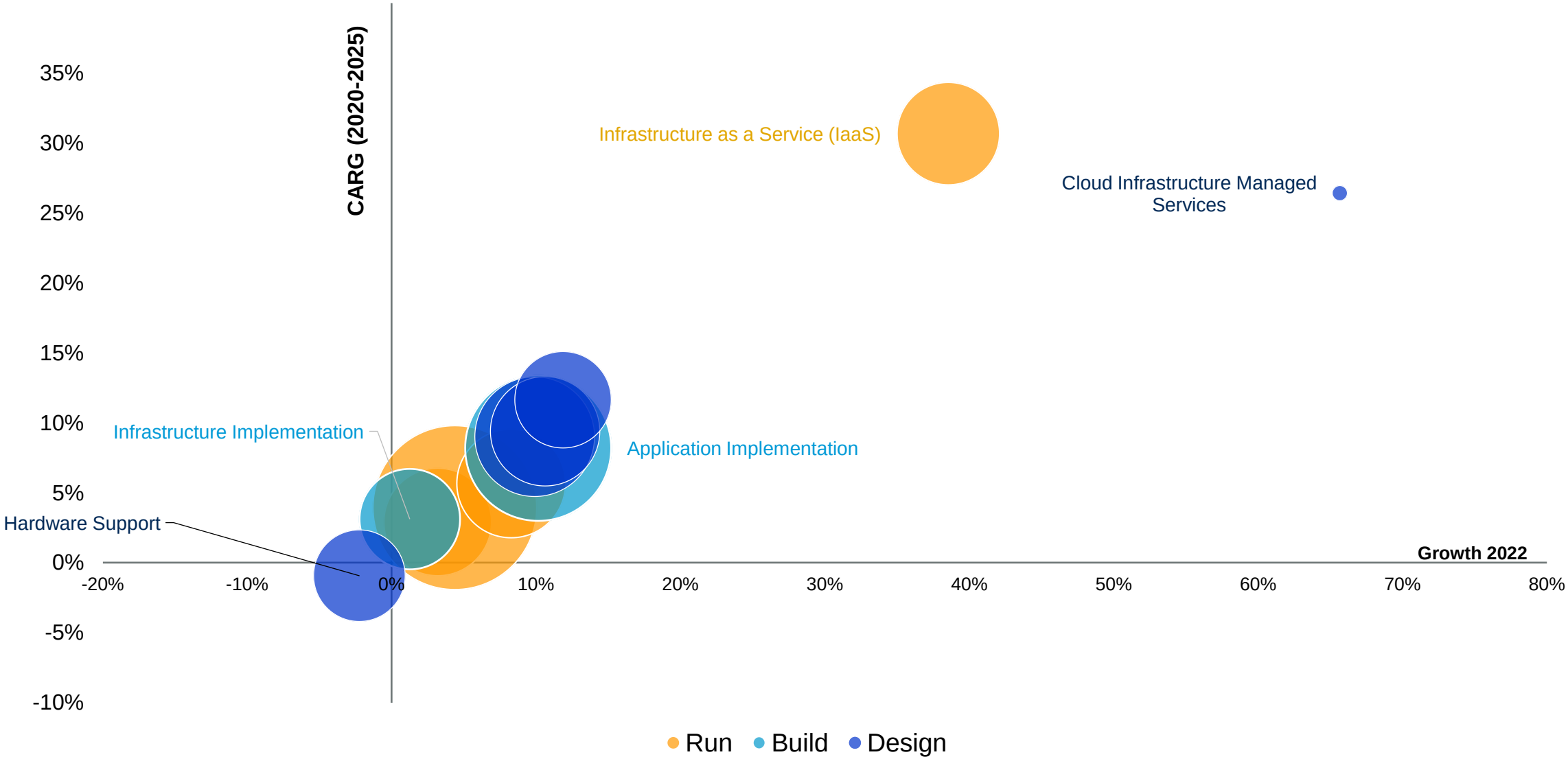
From On-Prem to Cloud



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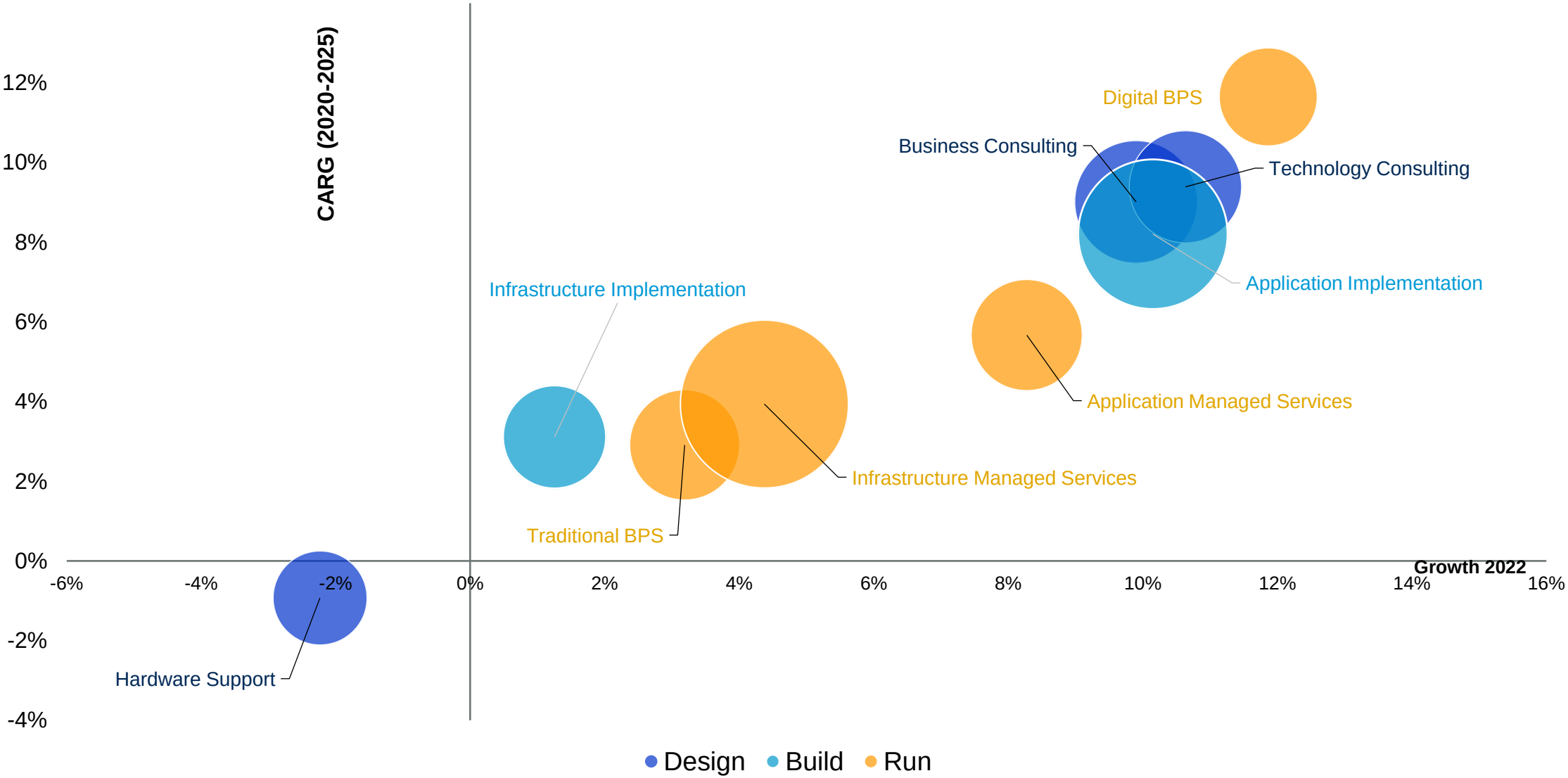
From Buy to Build



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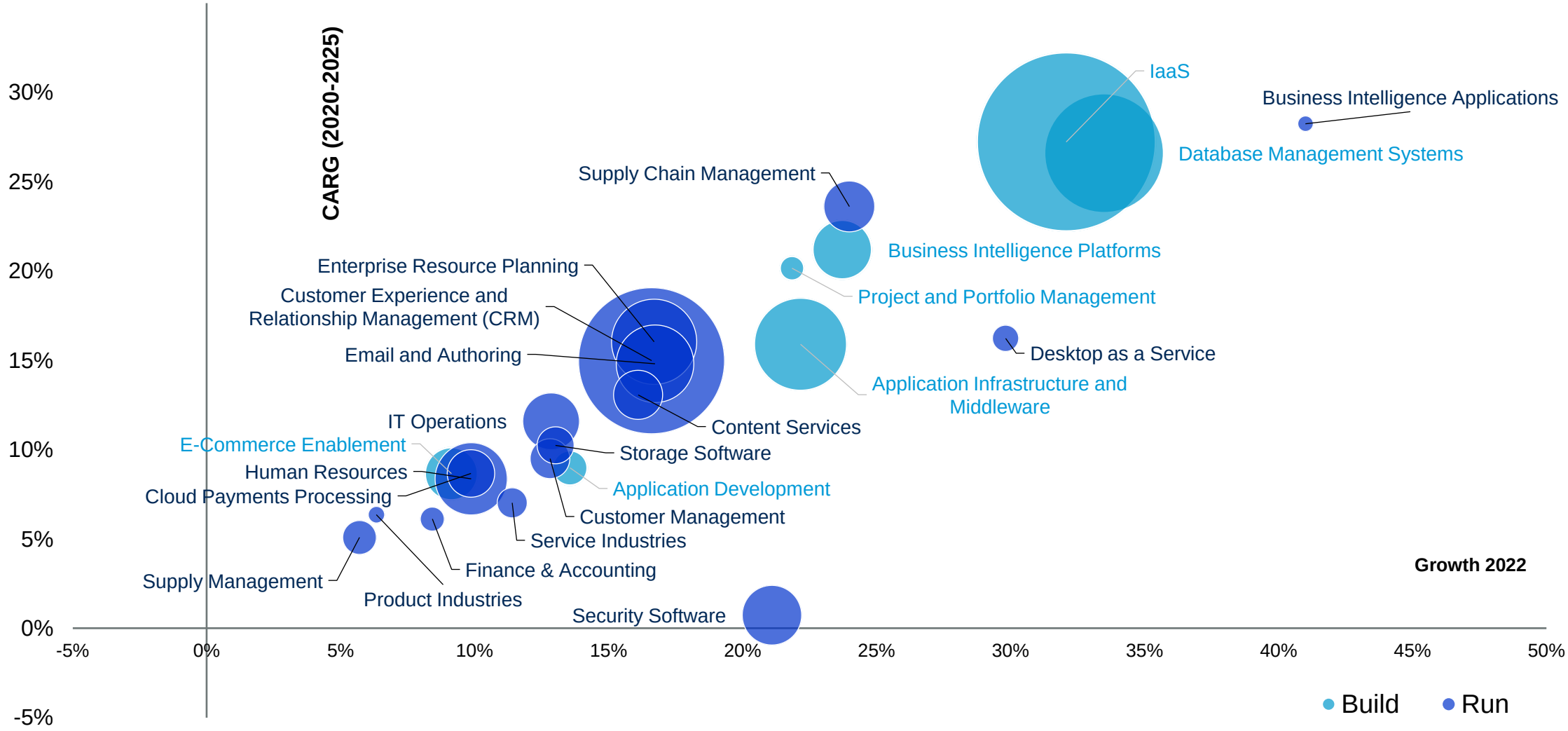
From Buy to Build



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Source – IT databook and all IT spending Forecasts

Total IT Spending is 4.4 Trillion US Dollars in 2022

	2019	2020	2021	2022	2023	2024	2025	CAGR (%) 2020-2025
Data Center Systems								
Spending ($B)	194	207	219	230	244	257	269	5.35%
Annual Growth (%)		6.74%	5.46%	5.37%	5.97%	5.35%	4.61%	
Devices								
Spending ($B)	697	809	825	838	875	911	944	3.13%
Annual Growth (%)		16.10%	1.87%	1.61%	4.39%	4.15%	3.67%	
Software								
Spending ($B)	530	614	675	755	846	946	1,051	11.32%
Annual Growth (%)		15.92%	9.83%	11.84%	12.06%	11.86%	11.04%	
IT Services								
Spending ($B)	1,071	1,185	1,265	1,373	1,498	1,636	1,778	8.45%
Annual Growth (%)		10.63%	6.75%	8.52%	9.15%	9.21%	8.66%	
Communication Services								
Spending ($B)	1,396	1,443	1,448	1,478	1,510	1,541	1,571	1.71%
Annual Growth (%)		3.37%	0.34%	2.03%	2.19%	2.07%	1.93%	
All IT								
Spending ($B)	**3,889**	**4,260**	**4,432**	**4,674**	**4,973**	**5,292**	**5,613**	5.67%
Annual Growth (%)		**9.53%**	**4.03%**	**5.46%**	**6.41%**	**6.41%**	**6.07%**	

Source: “Gartner Market Databook, 3Q21 Update”, July 2021

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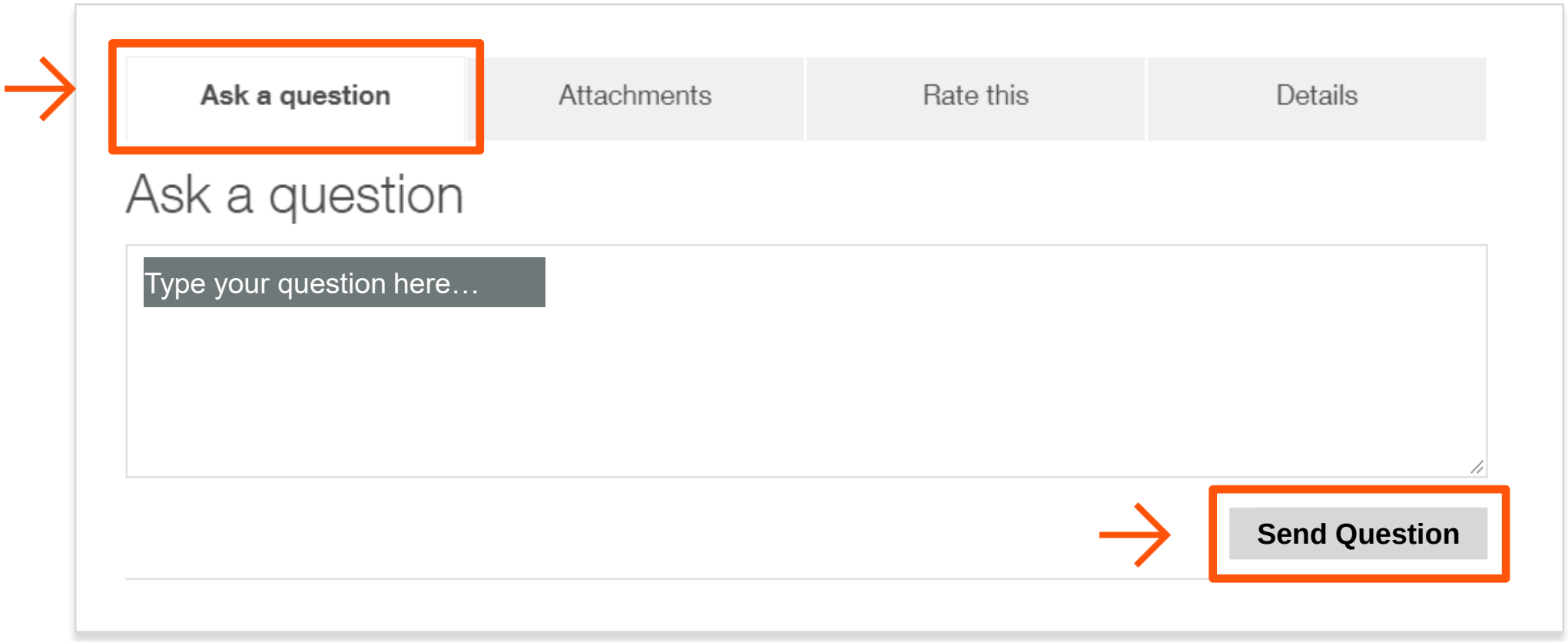
Ask your questions



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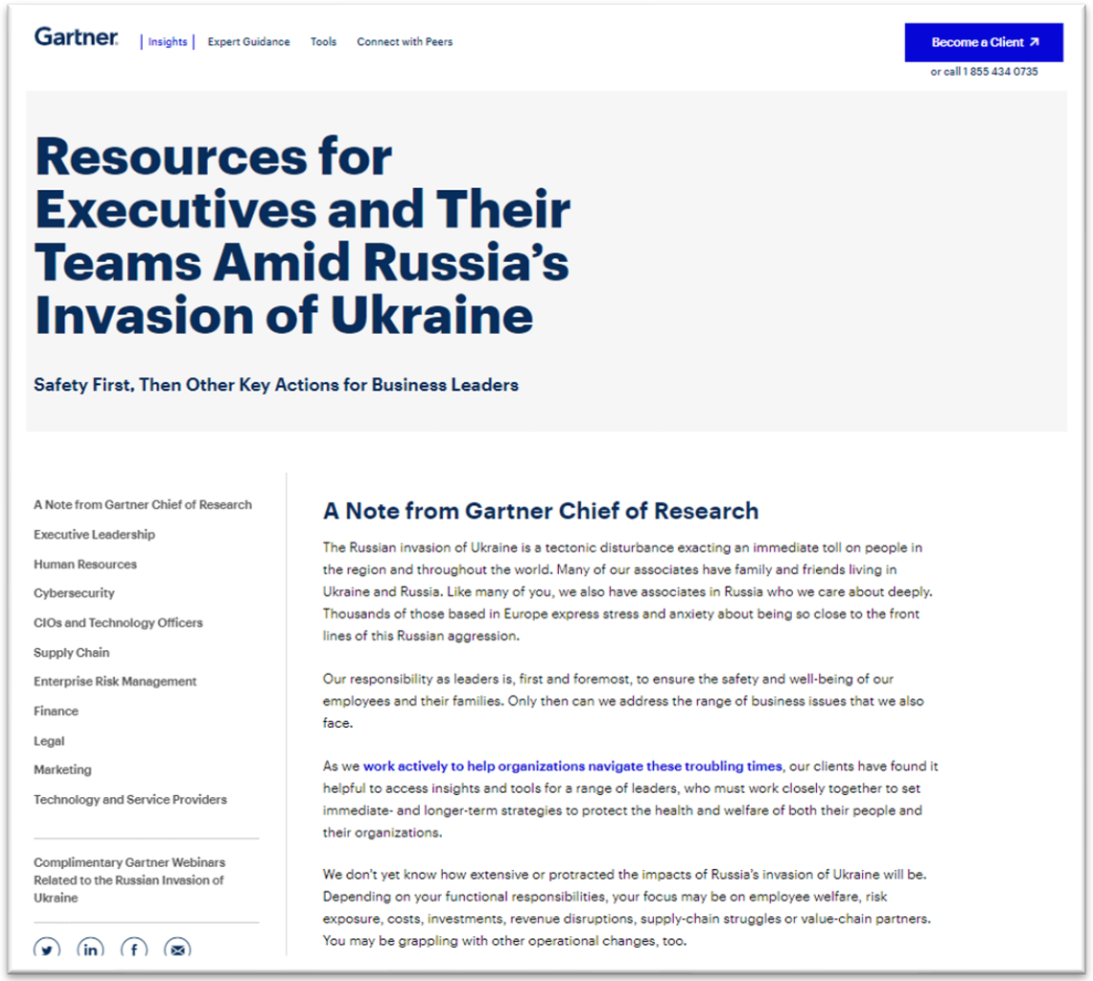

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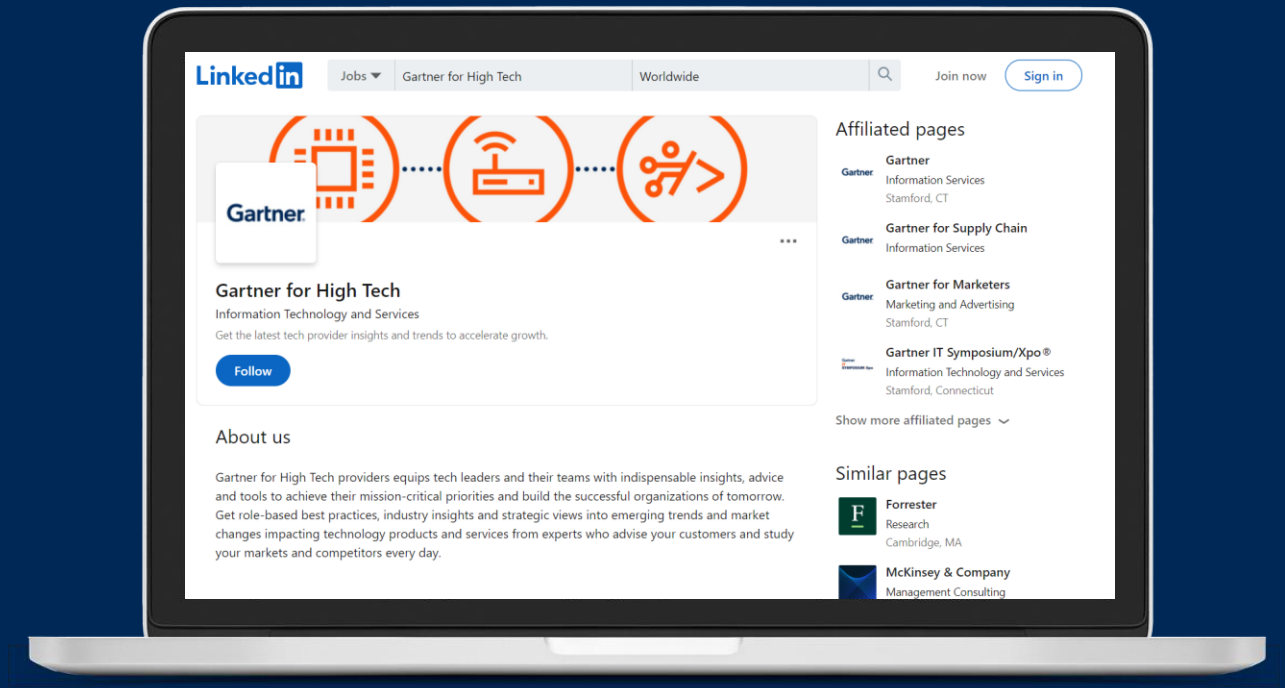

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