

WHO PAYS FOR IT-RELATED PROJECTS?

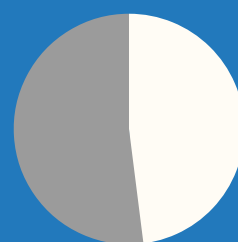
IT vs. LOB

WORLDWIDE SEMIANNUAL IT SPENDING GUIDE: LINE OF BUSINESS

WESTERN EUROPE TECH SPENDING

LOB IT spending will reach \$191 billion in Western Europe in 2018, a 6% increase over 2017.

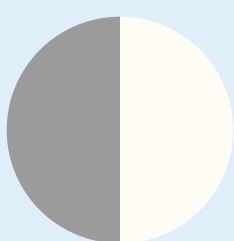
IT
52%



LOB
48%

LOB versus IT spending share (2018)

IT
50%



LOB
50%

LOB versus IT spending share (2021)

LOBs WILL CATCH UP BY 2021

By 2021, LOBs and IT will fund tech spending equally.

INDUSTRIES EXPOSED TO SHADOW IT IN 2018

51% of Western European LOB IT spending will come from **Banking, Manufacturing, and Professional Services**



Manufacturing



Retail



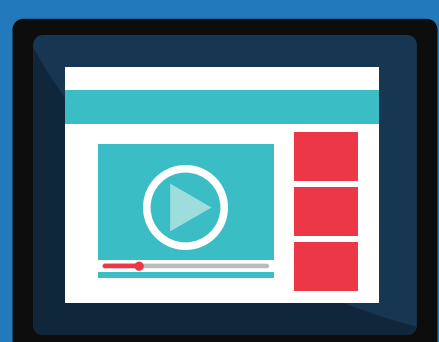
Professional services

FASTEST GROWING VERTICALS IN 2018

Shadow IT will move fast across professional services, retail, and process manufacturing.

LOB SOFTWARE SPENDING WILL DRIVE GROWTH

While IT departments will remain the primary funding source in 2018, this trend will reverse in 2019.



TOP 3 IDC TIPS

1. Listen to business managers' IT needs
2. Embrace the shadow IT model without compromising security
3. Focus on software applications

This infographic highlights the results of "IDC's Worldwide Semiannual IT Spending Guide: Line of Business, 1H17". This product quantifies the purchasing power of the non-IT department technology buyer. Delivered via IDC's Customer Insights query tool, users can easily extract meaningful information about technology markets and industries.

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