ICT Priorities in Utilities - Enterprise ICT investment plans

Description: This report presents the findings from a survey of 149 utilities regarding their Information and Communications Technology (ICT) investment priorities. The survey investigates the core technologies which utilities are investing in, including the likes of enterprise applications, security, mobility, communications and collaboration, and cloud computing.

WHY WAS THE REPORT WRITTEN?
In order to provide deeper insights into utilities' ICT investment priorities and strategic objectives.

WHAT IS THE CURRENT MARKET LANDSCAPE AND WHAT IS CHANGING?
Utilities are spending on core technologies as well as advanced technologies such as cloud and mobility to remain competitive in the market.

WHAT ARE THE KEY DRIVERS BEHIND RECENT MARKET CHANGES?
While utilities are looking at investments in IT systems management to counter the increasing complexity of their ICT infrastructure, the need to improve business agility and thereby enhance overall operational performance is expected to shape the demand for mobility and cloud computing technologies.

WHAT MAKES THIS REPORT UNIQUE AND ESSENTIAL TO READ?
Significant resources have been invested in order to interview CIOs and IT managers about their IT investment priorities. Very few IT analyst houses will have interviewed 140+ ICT decision makers in utilities.

KEY FEATURES AND BENEFITS
- Recognize utilities' strategic objectives with regards to their ICT investments.
- Identify utilities' investment priorities based on their budget allocations across core technology categories such as enterprise applications, security, mobility, communications and collaboration, and cloud computing, etc.
- Learn about the drivers that are influencing utilities' investments in each technology category.
- Establish how utilities' IT budgets are currently allocated across various segments within a technology category.
- Gain insight into how utilities plan to change their IT budget allocations across various segments within a technology category.

KEY MARKET ISSUES
According to the report, percentage of respondents expecting their ICT spending to remain flat is likely to decline by 4% to 34% in 2013, while the percentage of utilities expecting a slight increase in their ICT spending grows from 32% to 34% over the same period.

The survey shows that utilities are placing high levels of importance on the strategic objective of improving security and privacy, with the highest average ratings of X on a scale of 1 to 4.

Utilities are set to continue investing in innovative applications to drive automation and enhance their competitiveness, with 91% of respondents planning investments in this space in the next two years.

Utilities are putting a lot of emphasis on deploying various IT systems management solutions and minimising their ICT infrastructure complexity, as the majority of enterprises are operating in either a very complex or a somewhat complex ICT environment.
Adoption of virtualization, green IT, and cloud based technologies is expected to rise amongst utilities as they look for ways to reduce their overall IT costs.

KEY HIGHLIGHTS

Identity and access management (IAM) is the most widely deployed security technology, followed by database security and backup and archive.

The need to predict demand and supply trends accurately, and quickly react to changing market dynamics is driving the demand for BI solutions amongst utilities.

The need to reduce their carbon footprints and overall operational costs, while improving value-to-cost ratios is driving the demand for green IT and virtualization solutions.

Utilities are prioritising their investments in mobility technologies to make their enterprise information accessible to all stakeholders from remote locations.

IaaS is the most widely used cloud computing technology. The survey indicates that a large portion of enterprises are already using IaaS, while X% are planning to make significant investments in IaaS in the next two years.

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