Enterprise Vendor
2017 Research Agenda

Helping organizations thrive in a connected digital economy
Introducing Ovum

Ovum is a market-leading data, research and consulting business focused on helping digital service providers and their technology partners thrive, in the connected digital economy.

The Digital Economy will be worth $4.8 trillion by 2025
Source: Ovum

Four critical market transitions

The digital economy is being transformed by new technologies, increased customer expectations and changing regulatory environments. To thrive, digital service providers must navigate critical market transitions.

01 Consumer services
The transformation of consumer service by social, mobile, video, and data driven technologies

02 Enterprise services
The migration of traditional on-site enterprise ICT to managed and cloud delivery models

03 Infrastructure
The migration of infrastructure from physical to on-demand

04 Industry
Vertical-specific market and technology implementations

Introducing Ovum helps vendors capitalize on the opportunity created by IT and business transformation

Our insight is actionable to support your business and product planning and go-to-market initiatives.

→ What is the disruptive potential of emerging technologies?
→ How are changes in customer demand impacting consumption?
→ How large is the opportunity and how is this forecast to change?
→ What is the local competitive and regulatory landscape?
→ Which service elements resonate most with the market?
→ Which business and pricing models are most profitable?
→ What are the spending intentions of target customers?

Why Ovum?
We are uniquely qualified to help

Experience
We have been guiding our clients to growth for more than 30 years

Capability
We have more than 100 forecasts built with robust proprietary models

Approach
We have an in-depth market approach by vertical, technology, and country

Ovum provides authoritative data, market analysis and vertical industry expertise to empower your decision-making. We help you profit from new technologies and evolving business models.

Working with Ovum puts at your disposal more than 140 expert analysts based in more than 20 locations across the globe. We place market leading analyst support at the center of all our services.

We are part of Informa Group

FTSE 100 Informa Group is one of the world’s leading providers of business intelligence. Informa has over 6,500 employees and delivers specialized information to companies operating in sectors including agriculture, commodities, energy and utilities, financial services, healthcare and pharmaceuticals, maritime, telecoms, media and IT.
Enterprise Vendor Research

Welcome to Ovum’s 2017 research agenda for enterprise vendors

Digital transformation is at the top of the agenda across almost every industry sector, and is creating new opportunities for product and service providers to help clients deliver technology-enabled business strategies. Ovum provides detailed and data-backed research into the development and adoption of new technologies and the trends driving transformation around the world.

We have a 360-degree view of the market, combining an understanding of vendors and emerging technologies, with deep insight into enterprise requirements and the demands of the industries in which they operate. We help vendors achieve their growth strategies with a powerful combination of market data, expert analysis and enterprise insight - powered by surveys covering over 7,000 enterprise decision-makers.

Applications

Explore the meeting point of customers, analytics and mobility as enterprise applications, powered by data, evolve into enablers of digital transformation

The way enterprises assess, acquire, deploy, and use technology is changing at an ever-accelerating rate. The super themes shaping board-level agendas like big data, customer experience and digital services are enabled by the technologies this research program is centered on. The Applications program at Ovum encompasses three key research areas, Customer Engagement, Information Management and Enterprise Mobility and Productivity. Each of these teams provides depth of both enterprise, and market-focused insight; while delivering a breadth of topic coverage through collaborative research.

Use our Applications research to:

→ Forecast and act on the revenue opportunities for Information Management, Customer Engagement and Enterprise Mobility and Productivity technologies
→ Discover and build solution portfolios that recognize the rapidly converging enterprise technology market
→ Identify the “business outcome” drivers that define enterprise buying behaviour
→ Map the competitive landscape and build robust go-to-market strategies

Ovum’s approach to software analysis:

- What? Use case and deployment scenarios.
- When? Vendor solution landscape, spend predictions.

Tom M. Pringle
Head of Applications Research

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- When? Vendor solution landscape, spend predictions.

Enterprises IT management
Customer engagement
Enterprise productivity and mobility
Information management
Infrastructure solutions
Cloud native computing enabling innovation, agility, and customer adaptability

“Born in the cloud” organizations with key attributes such as software centricity, customer adaptive and innovative culture are disrupting many markets. The need to remain competitive for market incumbents is driving digital transformation and the move to the cloud which is impacting both enterprise and service providers, instigating significant change to both processes and technologies utilized in the IT environment. The necessity for agility and speed requires the adoption of an agile approach and more collaboration through DevOps within the IT function. The journey to becoming cloud native also requires software development and delivery to become a key competency, along with the availability of open APIs and proactive security, and the implementation of emerging technologies, such as microservices and containers.

Use our Infrastructure research to:

→ Develop a service transformation strategy
→ Ensure products and services are secure
→ Improve speed of product/service/software delivery
→ Understand the impact of digital transformation on products and services
→ Navigate the increasingly complex IT environment
→ Understand the criteria used when selecting cloud-based solutions
→ Gain insight into emerging technologies, such as microservices, and containers
→ Map out the journey to becoming a cloud native provider
→ Make software development a core capability
→ Understand latest integration approaches

Use our Industries research to:

→ Target the industries, regions and countries with the biggest opportunities
→ Understand where the future growth will come, and place your resources accordingly
→ Adapt your products and messaging to the specific needs of industry verticals
→ Develop solutions to address the biggest challenges facing enterprises in your target segments
→ Learn from industry best practice, with our enterprise case studies
→ Benchmark your solutions, using our Ovum Decision Matrix analysis

Use our expert analysts and industry-led research program to deliver the products and services that address the biggest pain points facing your customers

As the pace of technology driven change accelerates in all industries, understanding the business-level issues and challenges that drive investment in software and services has never been more important. The maturity and broad availability of advanced technologies across are as such as artificial intelligence, cloud, and the IoT are pointing the way to radical change in the products, services, and business models in a number of industries. Payments, insurance, and retail are among those that will experience the greatest change in the end user experience and competitive landscape over the next 10 years.

The rate and trajectory of these changes, and the subsequent needs of today’s enterprise, vary considerably based on the unique dynamics of each industry vertical. Understanding factors such as the business level pain points, end-user needs, and regulatory requirements at the industry level has never been more important.

Ovum’s approach to industry analysis: context matters
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Enterprise ICT Management

Ovum advises enterprises on structuring their IT organizations in response to digital transformation.
Enterprises today face a twin challenge: transitioning both the IT function and the technology environment to an as-a-service model.

As enterprises continue the journey from on-premise to cloud-based IT, managing the business of IT will be critical to becoming a successful digital service provider. It’s essential for suppliers to fully understand the dynamics of this transition if they are to effectively serve enterprise clients.

Vendors, service providers and consultants must all understand their customers’ digital business strategies, technology roadmaps, and agendas for transformation to ensure that their solutions are tailored to the enterprise ecosystem. There is also an increasing opportunity to play a direct role in aiding IT and business transformation, becoming a trusted partner to the CIO and other business leaders.

78% of enterprises rate technology innovation as a key element of their business strategy.

Themes for 2017

Shaping IT capabilities for the era of the digital service provider

To meet the needs of a digital business, enterprises must define a set of integrated technology capabilities to deliver new initiatives at speed, taking advantage of approaches such as agile, DevOps, and continuous improvement. They must also shape the skills and resources of the IT organization to take full advantage.

Managing digital risk

Digital services will have a significant impact on the enterprise risk landscape. Whilst many of the individual risks are not new, the adoption of cloud services, open APIs, data exploitation, and omnichannel access, when taken together, will require a fresh approach to risk management and governance.

Managing the modern portfolio

Adopting a portfolio management approach is a key discipline across projects, applications, products, and services. Businesses will benefit from a common approach to techniques including portfolio planning, resource management, demand management, and financial management.

Using enterprise architecture to avoid digital chaos

Research shows that as businesses adopt digital strategies, the complexity of the technology landscape can increase significantly, with increased integration points and a proliferation of services. Enterprise architecture can provide a valuable framework in which to set digital initiatives, improving coordination across digital services and core systems.

Tim Jennings – Chief Research Officer

Enterprise ICT Management

What’s New?

→ Enhanced Enterprise ICT Spend and Staffing Metrics tool – with a new interactive dashboard.
→ New Maturity Model – with a focus on digital transformation and the transition to becoming a Digital Service Provider.

Enterprise ICT Spend Benchmark

Australia, Financial Markets, US $200m revenues, 1000-4999 employees

Overall ICT budget 2016 (is US$m, as % of revenue)

<table>
<thead>
<tr>
<th>% of revenue</th>
<th>Minimum</th>
<th>Lower quartile</th>
<th>Average</th>
<th>Upper quartile</th>
<th>Maximum</th>
<th>Your actual spend</th>
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<tr>
<td>3.98</td>
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<td>10.81</td>
<td>12.06</td>
<td>12.94</td>
<td>9.8</td>
</tr>
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Overall ICT spend 2016

US $m

<table>
<thead>
<tr>
<th>Minimum</th>
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<td>9.8</td>
</tr>
</tbody>
</table>

Key Deliverables

→ Enterprise ICT Spend and Staffing Metrics – offering powerful insights into estimated ICT expenditure and staffing levels.
→ Enterprise Case Studies – recommendations, best practice, and advice from real-world solution deployments.
→ Maturity Models – covering best practices for technology deployment and management.
→ How-to guides – providing practical advice on key enterprise management topics.
“Only Ovum combines its Information Management and Customer Engagement teams to explore the nexus of customers and data, and the role they play in a digital future.”
As vendors compete for the omnichannel high ground, which tools should be embraced to cultivate strong, profitable customer experiences?

Enterprises are faced with radical shifts in the technologies that underpin their customer communications. What used to be the realm of the contact center is now a multithreaded environment incorporating marketers, IT professionals, back office employees, and customer-facing agents. The scramble to own the customer experience has drawn in vendors from multiple market segments, all increasingly focused on meeting the omnichannel challenge. The market is volatile and the prize substantial. Success will depend on providing enterprises with the capabilities to intelligently orchestrate customer engagement and deliver a positive customer experience.

Themes for 2017

Understanding customer channel preferences as the key to omnichannel success

As the various generations of customers transition through the marketplace, digital service providers must accommodate a variety of styles and expectations. Successfully implementing an omnichannel approach will require the ability to match constantly evolving customer preferences to the right channel, maximizing enterprise performance, profitability, customer satisfaction, and long-term loyalty. This will depend on sound investment in a range of new technical capabilities.

How to orchestrate the omnichannel foundation

The shift from voice-centric customer care to the digital omnichannel era is having a profound effect on contact centers and enterprises, and depends on multiple capabilities across departments. From personnel staffing through platform selection, purchasing, marketing, sales, accounting, and billing, transitioning from a contact center to CX focus requires the broad-based participation of the entire organization.

Customers will begin to define enterprise architecture

Given the intense global competition for customers, external realities, particularly the customer should directly influence enterprise architecture, and yet this is seldom the case. User experience is crucial for customers, but equally important for the employees who define it. Balancing the equation means selecting the technology tools that serve both users’ needs.

Big data, the Internet of Things and automated customer experience

When it comes to customer experience, IoT and Big Data are two sides of the same coin. With IoT comes the opportunity to push customer service interactions into fully automated territory for the first time, but doing so requires immense amounts of data, as well as the insight and knowledge that data brings. Understanding how big data affects analytics, CRM, and other systems is critical to investing in next-gen CX tools.

Key Deliverables

- Contact center and CX technology market sizing and forecasts – based on Ovum’s proprietary agent positions data.
- Big Data and IoT analysis – combining Ovum’s customer engagement expertise with horizontal insights.
- Enterprise how-to guides – on the steps required to make an organization truly customer adaptive.
- New Ovum Decision Matrices – covering core contact center and customer experience technologies.
Half of your employees aren’t actively engaged at work, and the other half likely access customer data and corporate systems using unmanaged devices.

Themes for 2017

Sustaining new digital workstyles, without compromising IT control and governance

Continued growth in the use of employee-owned devices and self-selected applications is changing the face of the end-user computing environment. However, most employees still expect their employer to provide the tools and technology they require. Employers must empower their people with robust applications that maximize productivity without compromising security, and create environments where new digital workstyles, across multiple devices, are fully accommodated.

Enterprise mobility management for the digital business

Up to now, device management capabilities have largely driven the adoption of enterprise mobility management (EMM) solutions. As enterprise mobility becomes the status quo, new technology solutions must enable employees, secure sensitive data and deliver actionable business insights. Investments in technology to support the new end-user computing environment will only accelerate, and EMM solutions are well positioned to support this evolving demand.

A modern approach to end-user devices and the digital workspace

The power and capabilities of new mobile end-user devices, the applications they run, and the services they connect to, offer significant benefits. The idea of what constitutes a modern digital workspace already extends beyond the PC, and within five years it will extend beyond the smartphone and tablet too. To avoid device lock-in, a new approach must be considered. Devices should be seen as containers for applications, and evolving employee behaviors must be better understood and accommodated.

Assessing the winners and losers in communication and collaboration platform consolidation

The proliferation of communication and collaboration platforms is well documented. We are entering a period of consolidation in a cloud- and mobile-first world, and there will be winners and losers. Who will they be, what will they offer and how should enterprises learn from their successes and mistakes?

What’s New?

→ Enterprise mobility management insights – helping you understand this fundamental requirement of the modern end-user computing environment.

→ Employee engagement insights & analysis – on its importance and how to improve it.

→ Digital skills report – on their increasing significance and how to boost them.

→ Any-device management report – on why it’s important and how to approach it.

The Digital Workspace Manifesto

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Key Deliverables

→ Industry analysis and opinion – on the major transitions and events shaping the future of the industry.

→ Vendor, product, and solutions SWOT analysis and recommendations – evaluating the strengths, weaknesses, opportunities and threats.

→ Product comparison reports and evaluation models – the industry’s most detailed reports

→ Horizon scanning, trend spotting, and opportunity assessments – helping you to plan for the future and avoid unnecessary obstacles.
Information Management

The challenge of working in a multi-vendor environment will continue to grow for vendors of information management solutions. End-users expect seamless access to data and content, both big and small, through intuitive tools suitable for non-experts, but the technical work required to achieve this is immense. Routes to market have also become more complex, with budget holders reassessing their approach to data and content architecture to remain competitive.

In a more disparate data and content landscape, joining these dots and applying advanced, easy to use analytics is the first port of call for vendors. The emergence of more and new types of buyers will further complicate things, and vendors must be able to reach them through direct channels, multiple cloud platforms, and professional services partners. They must learn to explain their capabilities in terms of business outcomes, using the language of business stakeholders, not analytical experts.

The information management (IM) market is forecast to be worth $65.6bn by the end of 2016, with a compound annual growth rate (CAGR) in excess of 10% through 2020.

What’s New?
- End-user focused survey – exploring the priorities and preferences of information management decision makers.
- New enterprise-focused ‘hands-on’ reports – highlighting the key considerations when assessing and implementing new investments in technology.
- Data Management & Big Data research – in-depth examination of data management tools and approaches that can accommodate the new requirements of big data.

Themes for 2017
Self service data management and analytics; catalyzing big data democratization

The benefits of using big data to develop big picture insights must be provided across multiple user types – automation and ease of use will define success. It’s assumed that data scientists’ unique needs are not met by off the shelf tools, and that their complex analytics require command line programming. But their time is valuable, and given the growing availability of off-the-shelf ML algorithms there is increasingly less need for them to reinvent the wheel, and more need to share and spread the impact of their work.

Smart Analytics, powered by AI will provide guided analysis for the majority
Simply adding Hadoop connectivity to BI tools doesn’t address the challenge of making Big Data intelligible to the business analyst. It doesn’t indicate which data sets to look for, what signals to identify or where to start asking questions. Just as BI redefined decision support, AI/ML will empower the user with a “guided experience” to cut through the noise of all data.

In a distributed IT landscape, who owns Analytics?
The question of who owns the analytics end user and the query has been an eternal tug of war between line of business applications, analytics providers, database providers, and system integrators. There is no silver bullet, but the vendors that add the most value in enabling change for the customer will win the highest share of mind and wallet.

Content is at the heart of digital transformation
Organizations are digitally transforming themselves in order to support the end to end customer journey. Creating a seamless experience across all channels depends on the effective matching of digital and physical content. Blending new capabilities like geo-location, preference analytics, mobile capture, and greater use of e-forms will help to eliminate the friction between on and offline experiences.

Keeping data governance, privacy and architectural implications front of mind
Analytics is driven by data, and its benefits depend on effective data management. The impact of governance, including data quality, MDM, organizational responsibility, along with privacy management and the impact of existing architecture are all too-often under-funded afterthoughts. A new, expanded approach to effective data management is required to encompass both existing, well-understood needs as well as emergent, rapidly changing enterprise requirements.

Key Deliverables
- Enterprise how-to guides – covering the latest technologies in analytics and content, helping organizations decide where to invest and what to re-assess.
- Market landscapes – helping you to understand the rapidly expanding self-service and visual analytics markets.
- Market sizing and forecasting – dedicated to the key technologies that will form the foundation of successful go-to-market strategies.
- Ongoing comment and opinion – regular updates on this rapidly changing market, from the key vendors’ product releases through to new trends disrupting the industry.
Ovum helps organizations map out the journey to becoming a cloud native provider.
Infrastructure Solutions

Market disruption is forcing enterprises to adopt cloud-based technology platforms in order to better support new business models, innovation, and digital transformation.

The adoption of cloud-based solutions requires service providers to have a transformation strategy that will protect existing revenue streams, engage with ecosystems, and embrace the API economy. This move to digital platforms also means that service providers and vendors need to re-evaluate the way new products and services are brought to market, whilst addressing the increased threat landscape and protecting against new cyber-attacks.

Exploiting the cloud environment presents a significant opportunity for service providers. Organizations will increasingly look for services provided by a third-party and a trusted partner to help fill the security knowledge gap and provide services to protect, identify, and mitigate threats. In addition, vendors must urgently embrace the increased pervasiveness of software and re-architect their stack to enable the adoption of emerging technologies and approaches.

Themes for 2017

Safeguarding an organization’s reputation and trust

Current approaches are designed to mitigate yesterday’s threats, not those faced by organizations transforming into digital service providers. There is an urgent need for more targeted security intelligence and the adoption of new approaches, such as digital identity, security analytics, and behavioral monitoring.

Establishing an API-based architecture to support business transformation

Integration capabilities assume a greater significance during the adoption of cloud-based solutions and digital transformation. APIs play a critical role as flexible interfaces to cloud services and enablers for mobility, IoT, and new applications. The API ecosystem also enables the monetization and development of new API-enabled business models.

Managing the transition from on-premise to the cloud

Cloud computing has up to now been focused on IT change but in future it must be guided by business transformation. The journey to cloud-based platforms needs to address ecosystems, the hybrid environment, integration issues, and IT management challenges. A cloud strategy should also include the adoption of microservices architecture, containers, and serverless computing.

Incorporating automation into IT processes and platforms

Artificial intelligence, machine learning, and software robotics are no longer the technologies of tomorrow. The use of the cloud enables automation functionality to be incorporated into platforms and applications. Sophisticated algorithms are being created to augment human decision-making and to improve competitiveness.

Managing the complex hybrid IT environment

One outcome of the IT transformation journey is an increasingly complex hybrid IT landscape. In order to improve visibility and control the IT function and service providers should look to improve visibility and adopt concepts such as virtualization, software-defined environment, performance monitoring, and operational analytics.

What’s New?

→ Major service provider software stacks analysis
→ Cloud platform maturity and assessment model
→ Next generation endpoint security solutions research
→ Software market forecasts for integration, application lifecycle management, and IT management

29% of enterprises placed transforming the IT capability as the most important IT trend.

Microservices architecture

Key Deliverables

→ Software market forecast – with a five-year view on growth in the infrastructure software markets segmented by vertical, region, and function, and updated annually.
→ Ovum Decision Matrix – providing comparative evaluation of the leading enterprise technology solutions, accompanied by individual SWOT assessments.
→ Market landscape – with solution capability comparisons for emerging technology areas.
→ Case Studies – recommendations, best practice, and advice from real-world solution deployments.
→ On the Radar – brief assessments of emerging vendors in the infrastructure solutions market.
The Internet of Things is the most disruptive wave of technology-driven change for business and consumer markets in a generation. IoT applications range from increasing efficiency in manufacturing and healthcare, to shifting the way people interact with cities, buildings, cars, and the environment. Many new service areas and use cases will emerge as the IoT spreads, disrupting industries and creating new revenue opportunities. Its impact on sustainability will also be far-reaching.

Service providers and vendors looking to succeed in IoT must navigate a complex and fragmented marketplace. Understanding demand drivers, the specifics of industries and regulation, and partnership models will be just as important as innovative technology development and underlying infrastructure. Leveraging IoT data effectively for analytics and machine learning is key to realizing the IoT’s potential, but will require new tools, skill sets and business models. IoT strategies will not be one-size-fits-all - an agile approach is needed.

Cellular IoT connections will grow by 350% over 2016-2021, driven largely by NB-IoT adoption for low-power, low-cost use cases.

Themes for 2017

**IoT ecosystems and value chain**

As the M2M market evolves into the new connected landscape of the IoT, ecosystems are developing around leading platforms, and verticals such as automotive, healthcare, retail, utilities, and transport. Industry players must consider which ecosystems are critical to be part of, which partnerships will be successful in driving innovation, and where to position in the value chain.

**Vertical disruption**

Realizing the potential of IoT requires more than technology development. Understanding the transformative impact of the IoT on different industry verticals is a key challenge for all participants in the market. This includes understanding specific industry challenges IoT can help to address, and the disruptive impact of IoT on traditional business models.

**IoT technology evolution**

The timeline for IoT technology development is constantly evolving, and solutions and services providers need to stay abreast of investments, deployments, standards, and ecosystems in order to ensure investment is going to the right places. The advent of LPWA technologies for both licensed (NB-IoT) and unlicensed spectrum (LoRa, Sigfox) is being closely followed by Ovum’s analyst team, as is the impact of 5G on IoT opportunities.

**Horizontal platforms and capabilities**

IoT service providers and vendors are keen to develop horizontal solutions and platforms that can be deployed for many types of applications and industries. Best practice providers are building capabilities that extend the value of IoT solutions well beyond connectivity and devices, to gain the maximum value from IoT data. Leveraging assets and capabilities in cloud, analytics, artificial intelligence, and machine learning – whether through own development or through partnering – will be critical.

### Key Deliverables

- **Global IoT Forecast 2016-2021**
  - IoT forecasts for connections and revenue across 10 verticals, 5 key technologies, and 19 countries.
- **IoT Insight Survey 2017**
  - End-user B2B survey across country and vertical markets, identifying key drivers for IoT adoption, current state of play and future intentions.
- **IoT Trackers**
  - Ongoing tracking of M2M and IoT service provider contracts, platform deployments, and innovation investment.
- **IoT Framework and Trends Report**
  - Cutting through the hype, an up-to-date overview of the IoT landscape, value chain, outlook, and opportunities.
- **Regular profiles and case studies**
  - Of leading service provider and vendor IoT strategies.

### What’s New?

- **IoT Global Market Forecast 2016-2021** – new 5-year outlook for IoT connections, revenue, technologies, vertical applications, and splits by stack layer.
- **IoT Service Provider and Vendor Profiles** – best practice case studies and comparisons of positioning, technology approach, product & service strategies, and innovation.
- **IoT Insights** – multi-country survey of senior enterprise ICT buyers evaluating IoT intentions, implementations, expectations and obstacles, for major verticals.
- **IoT Vertical Strategies** – IoT opportunities and challenges in key verticals, including use cases, vertical IoT ecosystems, key players and partnerships, and disruptive business models.

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Industries

“Only Ovum has a team of analysts in its Industries practice dedicated to serving the payments industry.”
Retail Banking Technology

In response to growing competition and customer expectations, banks must focus on digitization and new partnerships in order to transform their products, services, and the customer experience.

The growing maturity of vendor offerings across the digital channel and core platform spaces will see banks continue to look to third parties for support in their transition towards becoming digital service providers. While there will remain a strong market for point solutions, interest is growing in longer-term strategic partnerships that deliver industry-wide best practice across the bank.

The ability to support the next wave of change, leveraging cloud as standard, AI integration, end-to-end process automation, and the emerging Banking-as-a-Platform model will be essential differentiators for providers.

Retail bank IT spending globally will reach $150.8bn in 2020.

Themes for 2017

Delivering the digital bank: growth through innovation
The pressure to deliver greater operational resilience and security, alongside innovation in the customer experience, will drive investment in modern, flexible, and real-time core systems. Cloud technology will play an increasingly important role in delivering organizational agility, while new entrants and the fintech ecosystem will continue to raise the bar for incumbent providers.

Personalizing the bank: channels and the customer experience
Fully digital and mobile first account servicing and product origination are becoming baseline requirements as part of best in class channel experiences. Developing personalized and contextually relevant experiences is now the focus. Advanced customer analytics, AI, robo-advice, and augmented reality will be key areas of investment for institutions looking to develop their channel propositions.

Embracing the opportunities: the fintech ecosystem and open APIs
Interest in partnering with innovators from across the value chain, and particularly the fintech space, is growing. Open/external APIs will be an important catalyst of change, particularly where mandated by regulation such as PSD2, and will open the door to a range of innovative use cases. On the back of this, the Banking-as-a-Platform model is likely to gain traction, driving further interest in de-coupled offerings and business models.

Managing security in the digital environment
Delivering innovation while ensuring customer protection remains a key challenge; particularly as the nature of the security threat continues to evolve. Big data and AI are becoming more important in delivering enterprise-wide solutions for fraud and financial crime, particularly in the compliance space. At the retail level, the role of biometrics and other identifiers in enhancing the customer experience makes security a key business driver.

What’s New?
→ Retail Banking Software Contracts Analytics – with expanded scope and coverage in 2017.
→ ICT Enterprise Insights – including deeper coverage and insights on digital channels, security, and core banking.

Core banking systems in the European market, 2016–17

Overall technology assessment score (scale 1-10)

Overall execution assessment score (scale 1-10)

Follower
Challenger
Leader

Note: scale has been adjusted to improve legibility

Key Deliverables
→ ICT Enterprise Insights – global survey of retail bank pain points and IT buying intentions for 2017-18.
→ ICT Spending Forecasts – global 5 year projections for retail bank IT spending, segmented by country, source, and line of business.
→ Banking Software Contracts Analytics – global analysis of packaged software deals, segmented by institution, vendor, and solution area.
→ Ovum Decision Matrix – analyzing the leading vendor solutions in key areas, including digital channel platforms, and financial crime.
Insurance Technology

Technologies such as IoT and advanced analytics are reshaping the insurance industry: in terms of its products and players it will be unrecognizable in 10 years’ time.

Maximizing the partner opportunities in this highly regulated sector requires deep understanding of the specific issues insurers face and how technology-based products, services, and propositions can address them. The challenge for ICT vendors wanting to engage with the sector is how to apply technologies such as IoT and cloud in an insurance-specific context, and translate this into an offering that will resonate with insurers.

80% of insurance CIOs expect cloud technology to significantly change or transform both the insurance industry and their organization within five years.

What’s New?

+ IoT Opportunity Focus – in-depth insights and analysis of the technology opportunities presented by the biggest area of change facing the industry.
+ Insurance Software Contracts Analytics – monthly analysis of insurer and vendor partnerships.

Themes for 2017

IoT and the evolution of the insurance proposition
Insurers will be compelled to respond as real-time monitoring of insured items, enabled by IoT, undermines today’s insurance business model. Utilities, telcos/ISPs, tech giants, auto manufacturers, home security companies, and instech start-ups all threaten to challenge the industry incumbents. Carriers must find ways to counter the host of new entrants. We believe they must move from a product-focused, retrospective compensation model towards that of a proactive, “risk manager” proposition to remain competitive.

Delivering the digital insurer: growth through innovation
Carriers must deliver the change demanded by customers, regulators, competitors, and instech start-ups. To do it they will need to utilize cloud technology at the core of their operations to provide the necessary organizational agility. The growing need for agility also makes the perennial issue of legacy modernization a critical challenge that cannot be avoided.

Personalizing the insurer: channels and the customer experience
In an ever more competitive environment, how can the insurance industry deliver a seamless, convenient, and innovative digital customer experience as the number of devices data sources grows exponentially? Critical to doing so will be the role played by advanced analytics including RPA, machine learning, and cognitive computing in delivering highly personalized and contextually relevant propositions. Small and mid-size insurers must find ways to effectively exploit new technology and keep up with both the large well-resourced carriers and agile instech start-ups.

Drivers for IoT-based initiatives among P&C Insurers

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Key Deliverables

+ ICT Spending Forecasts – global 5 year projections for insurance IT spending, segmented by country, source, and line of business.
+ Ovum Decision Matrix – analyzing the leading vendors solutions in key areas, including IT Services, and IoT Insurance Service Providers.
+ Insurance Software Contracts Analytics – global analysis of packaged software deals, segmented by institution, vendor, and solution area.
The payments industry is in the midst of huge change, driving considerable acceleration in IT investment. The need to deliver on growing customer expectations across retail, SME and corporate clients is putting a spotlight on areas such as immediate payments, blockchain technology, the needs of merchants, digital channel integration, and digital wallets. Meanwhile, security technologies such as tokenization and biometric authentication will increasingly become key enablers of service enhancement.

The opportunities that open APIs present to deliver entirely new products, services, and business models is on an area that, along with SaaS, will dominate investment priorities in 2017. The ability to support the industry in delivering innovation, and new revenue sources, through partnerships with third parties will be critical for service providers.

Payment providers must remain relevant as new technologies, entrants, infrastructure, evolving customer needs, and changing regulatory frameworks disrupt the future value chain.

Spending on Payments IT globally will reach $53.3bn in 2020.

Themes for 2017

Ecosystem evolution and emerging payments technology
As the industry ecosystem evolves and value chains fragment, flexibility in service delivery and the ability to easily support the next wave of value propositions will become essential. Open/external APIs will be an important catalyst of change, particularly in the retail payments space, where mandated by regulation such as PSD2. In addition to growth in the fintech space, this will open the door to a range of innovative services.

Omnichannel commerce
The convergence of commerce around the mobile device and blurring of the distinction between physical and digital channels remains one of the biggest drivers of disruption in the payments industry. Merchant demand for contextually relevant customer experiences and greater international reach, alongside other added value services, will drive the agenda for acquirers, gateway, and processor business models. In particular, leveraging transaction data to drive new sources of value will be a critical focus area.

Identity, security, and the future of payments: from challenge to opportunity
The need to balance risk against reward has always been an inherent challenge to providing payments services, and with new forms of authentication such as biometrics and other identifiers playing a growing role in payments, this challenge will be even more acute. The role of tokenization in particular will be a focus.

Key Deliverables

→ ICT Enterprise Insights – global survey covering merchant, issuer, and acquirer pain points and IT buying intentions for 2017-18.
→ ICT Spending Forecasts – global 5 year projections for payments IT spending by banks and payment processors, segmented by country, source, and line of business.
→ Ovum Decision Matrix – analyzing the leading vendors’ solutions in key areas, including digital wallets, treasury management systems, and tokenization platforms.
→ Banking Software Contracts Analytics – global analysis of packaged software deals, segmented by institution, vendor, and solution area.

What’s New?

→ Payments Market Map – detailing global market size and forecasts for payment volumes by payment type and tool.
→ Payments Software Contracts Analytics – monthly analysis of issuer, acquirer, and processor partnerships with vendors.
→ ICT Enterprise Insights – including a new segment on retail.
Government Technology

25% of government agencies worldwide listed ‘transforming IT capability’ as their most important IT trend for the coming year.

Themes for 2017

The impact of AI on government decision making
Fiscal and resource constraints, increasingly complex interactions between systems, and the growth of data are driving interest in AI among government CIOs and CTOs. The path to adoption for agencies will likely be iterative and evolutionary. The market is set to expand as government agencies turn to AI solutions and seek new technologies to better understand citizens and their interactions.

Codifying the digital transformation of government
Most government agencies are in the early stages of adopting an architecture that is integrated, seamless, intelligent, and increasingly automated. They need help to understand the art of the possible, what this means in terms of organization structure and culture and the barriers to avoid. They will need to develop a robust set of strategies to navigate the transition to digital services.

Managing risk in digital services at the city level
The digital transformation of public services is entering a new phase, enabled by innovations in digital identity assurance and IoT. Cities are using connected devices to manage vital urban infrastructure like transport, traffic signaling, water, and energy. At the same time they are allowing citizens to access more sensitive services online. The combination of digital transformation and the need for stronger ID management tools requires a new approach to risk management from cities.

Delivering self service analytic tools for government
There is growing demand to enable business leaders and front line staff access to analytic tools that can be used to undertake analysis using predefined queries. The route to adoption and management of data still remains a challenge for agencies, complicated by barriers to the sharing of data. As these barriers are slowly eroded, agencies are seizing the opportunity to review their usage of analytic tools and develop enterprise wide approaches adoption.

Integrating citizen centric services in the city of today
Citizens increasingly expect cities to deliver a more personalized and interactive set of experiences. The fusion of IoT and neighborhood or city level services is gathering pace, increasing the ability of cities to pre-empt issues for citizens and communicate accordingly. For this investment to deliver, cities must consider how it integrates with existing back office processes like the impact on working patterns, procurement, finance, and citizen communications.
As the market for education services expands and competition increases, universities and colleges must explore new ways to implement IT to differentiate themselves and remain competitive.

The use of applications focused on improving interactions between students and facilities, such as student information and learner management systems, will continue to present opportunities for nimble vendors. The growing adoption of cloud, mobile, and other horizontal solutions, will further open the door to new players and change the competitive landscape. The key differentiator will be the extent to which the vendor provides strategic services that go above and beyond the technology solution itself. Vendors that engage with institutions in strategic and active ways are more likely to gain trusted partner status.

Over 50% of institutions will increase investment in their student information systems (SIS), a number likely to increase as the next-generation of SIS solutions emerge.

Themes for 2017

Making the case for analytics to accelerate institutional adoption
Business intelligence and analytics initiatives must effectively support institutional priorities. The stakes are higher than ever for institutions to prove they can help their students succeed. However, institutions struggle to do more with data and analytics. How can analytics be packaged in a way that encourages adoption, and what is required to move institutions from the sidelines? We outline and assess the approaches institutions may take, from purchasing point solutions to building custom solutions.

Meeting the needs of today’s students
As non-traditional students become the “new traditional”, institutions must reconsider how well they are serving them. Online learning platforms that provide support for a range of pedagogical techniques, including adaptive learning/competency-based education and SIS solutions that are flexible enough to support changing needs, will be highly sought after.

New and improved student information systems (SIS)
As higher education becomes increasingly dynamic, institutions face more challenges to maintaining optimal SIS operations. A significant number of institutions will go to market over the next 18 months as the next generation of SIS solutions emerge. Ovum assesses how nimbly these solutions can respond to unanticipated needs. The model for SIS adoption is likely to be different for each institution as they decide what to keep on premise and what to migrate to the cloud, with new hybrid models likely emerging.
The drive to integrate underlying clinical, patient and financial data is pushing CIOs to embrace new IT architectures taking into account cloud, mobile, customer engagement, and analytical tools.

After a decade of investment into e-Healthcare services, organizations are starting to address the issue of integrating clinical, patient, and financial data. New approaches to architecture in support of integration are driving the adoption of cloud and mobile healthcare solutions. In turn, this adoption will require vendors to demonstrate strong security credentials, particularly in terms of shifting from on premise hosting solutions to private cloud services. However, with increasingly limited resources, healthcare organizations will expect vendors to show an understanding of funding pressures and help them to develop progressive payment and licensing models.

Only 8% of providers have met their targets in transforming their IT capability to support digital services.

What’s New?
→ New series of healthcare case studies – recommendations, best practice, and advice based on the new experiences of providers.
→ Patient centric services framework – helping providers understand the big opportunities and how to capitalize on them.

Themes for 2017
Personalized care for the masses
Care based on individuals and health data and precision medicines has huge potential to reduce waste and improve outcomes. It requires identification of the right pathways to adopting big data as well as the right collaboration and analytic tools to drive personalized healthcare.

Digitizing healthcare outside hospitals: the horizontal approach
Healthcare provision is on the move, and building on telecare, m-health, and the growing adoption of wearables, connected healthcare is the next big challenge for providers and vendors alike. Joining the dots requires a horizontal approach to services, patient communications, and the remote provision of healthcare.

Building digital communication channels
In many respects, healthcare providers are behind the curve on developing patient centric communication channels. Historically, the ability to simplify complex and disjointed interactions was beyond many providers’ capabilities. With investment into CRM, EPR, hospital information systems, and communications tools, providers are now well positioned to develop omnichannel approaches to patient interactions.

Key Deliverables
→ Digital Healthcare Reports – helping providers and vendors understand the dynamics and perspectives of digital healthcare.
→ Market Expenditure By Provider Type And Solution – detailing the key market opportunities and informing the right investment decisions.
→ Industry Case Studies – exploring the art of the possible in adopting analytics and patient centric solutions.
→ On The Radar Reports And SWOT Assessments – helping providers to assess market supply options.
Telecoms Operations and IT

In order to transform their IT systems, software and business processes for the digital world, telcos must fundamentally rework their customer engagement and delivery models.

Preparing for digital services and using 5G and SDN/NFV to deliver agile, software-driven IP-based networks will have a profound impact on telcos’ OSS and BSS estates and operations. Assuring QoS and QoE for network and service performance will be critical. They must offer customers greater service relevance and control over content – for example through mobile self-service applications and multimodal digital channels – by using new tools, processes, and best practice.

From their suppliers, telcos will demand tools that monitor the quality of network and service experience, identify customer value, and personalize outbound offers and care. Telcos need partners capable of supporting customer journeys into digital domains, and cloud-based delivery models that offer additional flexibility for service creation and management. The market place is extremely competitive, with NEPs, ISVs, IT services, and professional services companies all converging on these opportunities. The winners will be those who provide a convincing end-to-end view across network and IT domains.

What’s New?
- CTO Insights – for the telecoms industry.
- Telecoms market forecasts and analysis – with an IT service provider focus.
- Telecoms market share report – with a Network and IT services focus.
- OSS/BSS cloud tracker

Themes for 2017

Managing & improving CX
Poor network quality, bad service delivery, and ill defined business processes and dependencies plague telcos as they try to improve their operations. OSS/BSS, CRM, policy software, and BI platforms are all part of the telco toolkit to manage the CE, and remain important drivers for IT spend. Our technical and commercial coverage delivers the directional insights for telcos and the vendor suppliers competing for their business.

Exploiting data assets with analytics
Big Data analytics provides an opportunity for telcos to exploit an existing asset that’s increasing in size exponentially. To date, market research has focused on the business case rather than the market opportunity and evaluation of analytics tools. In 2017, we will cover both aspects with a new market forecast on big data and an update to our 2015 decision matrix on analytics tools for customer data.

IT service opportunities in telecoms
The telecoms vertical has a specific set of requirements that cannot be served with ‘drag and drop” solutions from other industries. Telcos’ M&A activity, abundant legacy and the need for new operating models means that ICT and professional services companies need a forensic understanding of their strengths and weaknesses before they tackle the rich opportunities offered by the telecoms vertical. Ovum’s ‘Telecoms Operations & IT Practice’ assesses the services portfolio offered by key players, and looks at the value of this opportunity over the next 5 years.

Successful strategies for digital transformation
Telcos need lean, virtualized infrastructure to sustain their business and innovate new services. They must be able to orchestrate hybrid networks and services, use programmable software & analytics to automate and direct business logic, and manage the digital customer engagement end to end. Our research assesses how technology developments such as SDN and NFV (which enable private cloud) will shape the telco’s IT estate and the responsibilities of the CIO.

75% of telcos are transitioning to a digital operating model in the next 18 months.
Broadcasters and digital service providers are embarking on the media transformation journey to accelerate personalized customer engagement.

Central to this transition, termed the “Our Own Media Company” paradigm, will be highly complex, large scale media transformation projects, demanding the slow but steady migration of entire content supply workflows on to IP. Workflow orchestration must meet dynamic business needs, including the integration of IoT-connected living room experiences, VR content, and UHD content into the existing content value chain.

In the highly volatile media transformation era, both digital service providers and premium media asset owners are faced by three significant challenges: the lack of niche industry specific partnership ecosystems; insufficient multi-form content monetization functionalities and pre-packaged professional services; and traditionally offered household content and advertising services.

Broadcasters will lead the transformation journey, controlling more than half of total spend across the media transformation services segment by 2022.

Themes for 2017

Moving the content supply chain on to IP
According to Ovum’s ICT Enterprise Insights survey for Media, 37% of media enterprises identified operational efficiency as the core business challenge. The emergence of software defined networks, encoding, transcoding, and storage is pushing enterprises to move their content supply chain modules on to IP. Media distribution modules will lead this migration.

VR content: new rights & royalties complexities
In a multi-screen monetization ecosystem, managing complex rights and royalties is one of the pivotal challenges faced by today’s digital content owners. VR content is predicted to become mainstream in the next 4-5 years, and its evolution will contribute to revenue leakage and churn risks. Existing rights & royalties vendors will need to adopt this 360-degree video content format on a real-time basis.

Cloud, security, and network ICT services: accelerating transformation
The media sector has been slow in adopting cloud, security, and network technologies. However, demand will be fuelled as the majority of media enterprises begin to embrace the "digital audience first" growth strategy. Horizontal ICT services such as cloud security and networks that improve single media asset ROI and individual audience ARPU (average revenue per user), will be highly sought after.

Safeguarding video assets through real-time watermarking
In 2016, HBO plans to increase its premium content production budget by 20%. The proliferation of media and non-media devices along with dynamic video consumption patterns will result in media enterprises safeguarding their premium digital assets to accelerate ROI and operating margins. Real-time watermarking paves the way for a cost effective solution.

What’s New?
- Extended On the Radar library – including newly launched technology vendors around QoS and QoE.
- Media transformation ICT Services tracker (2016-2023) – with new coverage of publishers, sports franchises, and theme parks (encompassing cable TV, satellite TV, telecommunication multimedia services business, and TV & video broadcasters.)

Key Deliverables
- Innovative case studies – on a range of media transformation projects.
- Research notes on the changing market dynamics – across media delivery and distribution modules, with special emphasis on CDN and network based ICT services demand.
- Ovum Decision Matrix – on VR rights and royalties processing technologies.
Retail Technology

Retail is an industry undergoing rapid transformation. Growing customer expectations, particularly around the digital experience and its role in-store, is driving rapid change in the products, services and shopping experience retailers must deliver.

The growing complexity of the challenges facing retailers in delivering a truly seamless omni-channel experience will see continued interest in offerings from a range of third parties in delivering their transformation objectives.

In particular, the need to deliver a personalized customer experience alongside a streamlined and responsive purchasing journey will create opportunities across the ecosystem. The need for support in wholesale digitalization will drive a need for solutions across all areas, but particularly digital commerce and payments, CRM and customer lifecycle management, and an integrated real-time view of orders and inventory.

By 2018, retailers expect over 50% of their sales to come through mobile and online channels.

What’s New?

→ Brand new Retail industry technology coverage for 2017
→ ICT Enterprise Insights – new coverage and insights into the Retail vertical, with sub-vertical breakdown
→ New industry forecast for Retail technology

Themes for 2017

Omnichannel in practice – driving transactions online and in store

The convergence of commerce around the mobile device and blurring of the distinction between physical and digital channels remains one of the biggest drivers of disruption in the retail industry. Payment technology will be an important enabler of change, particularly where emerging solutions and regulatory changes will enable important changes in the customer experience.

Intelligent forecasting – Better business through data

Data analytics will play an increasingly important role in delivering operational efficiency gains in 2017, and will be central to broader digitalization projects. Enhanced inventory, store management, and logistics forecasting will drive clear ROI, particularly where data across all channels, customers, suppliers and other third parties can be leveraged to bring additional benefits.

A personal shopper for everyone – creating a personalized shopping experience

Customer demand for personalized and contextually relevant experiences will increasingly drive the agenda, particularly for retailers investing in their cross-channel capabilities. The ability to drive deeper customer engagement, through predictive recommendations as well as loyalty and social media will be a competitive differentiator. As a consequence, advanced customer analytics, AI, robo-advice, and augmented reality will be key technologies.

Key Deliverables

→ ICT Enterprise Insights – Global survey of retail challenges and IT buying intentions for 2017-18
→ ICT Spending Forecasts – Global 5 year projections for retail technology spending, segmented by country and technology type
→ Ovum Decision Matrix – Analysis of the leading vendor solutions in key areas of retail technology, including payments
Ovum provides insight into 22,000 IT services and BPO deals over $1m.
John Madden - Practice Leader

IT Services

To enable digital transformation among their enterprise customers, providers must leverage the convergence of ICT services in network, infrastructure, applications, and business process.

The market for ICT services is at a peak of accelerated change and hyper-competitiveness. Transformation is at the center of customers’ agendas as they look to capitalize on new trends and services in cloud, mobility, and analytics. Seeking ICT Services providers with the right skills and services to deliver on their business goals, they have more choice than ever before. Providers are being forced to change their portfolios, business and service delivery models to keep pace. In this increasingly cut-throat market, our team’s research and advisory services provide insights on how to successfully market services to customers, compete to win, and partner for success.

There is a growing trust in IT services suppliers for digital transformation - fewer than 3% stated they would not engage with such providers, an improvement from 20% in previous years.

What’s New?
- Enhanced IT Services Contracts Analytics tool
  - with additional functionality and data.
- Expanded Cloud Services forecasts
  - providing detailed geographic and vertical industry trends.
- Improved quarterly briefings
  - on major ICT services trends.

Themes for 2017

The modern ICT services provider
Digital transformation is forcing providers to shift their business models, go-to-market activities, and competitive positioning. They must move away from a one-dimensional cost arbitrage profile for services delivery, towards a three-dimensional model involving cost-savings, new skills, and innovation.

The partnering imperative
In order to succeed in the current market, ICT Services providers - telcos, network providers, SIs, and India-based firms – will need an effective ecosystem of technology, go-to-market, and innovation partners. Identifying, selecting, engaging, and managing those relationships is a process that is changing almost as quickly as the ICT Services market itself.

Modernization in the age of digital
For many customers, the modernization of infrastructure, applications, and business processes are critical first steps toward digital transformation. IT Services providers are putting modernization at the core of their transformation services for customers, with vertical-aligned paths in industries such as financial services, manufacturing, and public sector.

Automation and the services impact
Automation continues to have an impact on providers’ service delivery and labor arbitrage strategies, and concepts around cognitive automation could potentially reap huge benefits for customers in terms of leveraging data and business processes. The market is waiting for automation to become a core position in customers’ IT strategies.

Digital Enterprise

Scale across the enterprise
Maintain open communication channel
Manage the transformation
Prioritize and invest
Benchmark current digital competencies
Define a structured road map

Six steps to digital transformation

1. Define a structured road map
2. Benchmark current digital competencies
3. Prioritize and invest
4. Manage the transformation
5. Maintain open communication channel
6. Scale across the enterprise

Key Deliverables
- IT Services Contracts Analytics
  - tracking every publicly announced outsourcing deal worth over $1m, including more than 23,000 IT services and BPO deals. See page 51.
- IT Services Market Forecasts
  - a five-year view on growth in the IT services market, segmented by vertical, region, and IT services type.
- Cloud Services Forecast
  - a detailed look at growth across various cloud services types by geography.

Modernization

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Only Ovum offers detailed ICT spend and staff benchmarks based on comparison with 7,000 institutions across the globe.
Market Data and Tools

Introduction

Ovum’s data tools provide a complete suite of solutions to support your activities from strategic planning through to account level engagement. They are underpinned by our primary research and deliver robust market data to support effective decision-making.

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<td>IT spending metrics</td>
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<td>Discover the growth plans and breakdown of ICT budget allocation by area; see predictions for 60,000 organizations and model the spending profiles of your prospects</td>
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<td>IT investment priorities</td>
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<td>Identify the business challenges and latest technology trends driving ICT strategy, and understand investment plans by technology area</td>
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<td>IT spending forecasts</td>
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<td>Identify the growth trajectory of major software and services markets by region, country and industry segment</td>
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<td>IT contracts</td>
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<td>Track major deals in IT services, banking software, and telecoms OSS/BSS markets; identify trends and track the market traction of specific vendors</td>
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Ovum Interactive Decision Matrix

Customise your product comparisons to reflect your organization’s specific requirements

The Ovum Decision Matrix compares the leading solutions in major enterprise and industry-specific technology categories. It greatly reduces the time and risk involved in product and service procurement. Complementing the research report is the Ovum Interactive Decision Matrix which allows IT decision-makers to create a customized ranking of solutions based on the requirements of their own organizations.

Use this service to:

→ Fine-tune the Ovum Decision Matrix
→ Perform what-if analysis
→ Create an audit trail

Market Forecasts

The most comprehensive five year forecasts available

The dynamic nature of technology markets makes insightful, robust predictions essential to considered decision-making.

Ovum’s portfolio of enterprise software and services forecasts allows you to size the opportunity across major software, and IT services markets and identify current and future trends. Forecasts are available for enterprise mobility, information management, security software, and IT services.

Each facilitates detailed analysis of the predicted change in market size from 2015 to 2020 for multiple categories of software and service by:

→ Region
→ Country
→ Industry segment

An integrated approach to delivering robust results

We believe forecasts should be prepared as part of a collaborative process involving both quantitative and qualitative analysis. Our forecasting methodology has been developed to optimize the inputs from a variety of sources including:

→ software and industry analyst domain experts with deep expertise and experience
→ a centralized, dedicated team of six analysts that specializes in forecasting techniques, business modelling, and financial analysis.
Data Tools

ICT Enterprise Insights
Unrivalled insight into the investment priorities and hot issues for your target buyers and markets

An interactive interface to the largest annual global survey of ICT decision-makers. Drawing on the opinion of 7,000 respondents from 57 countries in 14 major industries. ICT Enterprise Insights provides perspectives on critical aspects of ICT decision-making: ICT budgets; business and technology drivers; industry hot topics and investment priorities; SaaS deployment by industry function; investment approach by technology; propensities to outsource and use of advanced analytics.

Use ICT Enterprise Insights to:
- Access a vast annual global survey of ICT decision makers, drawing on the opinion of 7,000 respondents from 57 countries across 79 lines of business
- Gain unrivalled insight into the spending intentions for cloud, mobility, analytics, security, and engagement
- Delve into the hot issues in retail banking, insurance, payments, healthcare, education, and government
- Assess the role of shadow IT in decision-making by industry and the proportion of budget allocated to running versus changing the business.

ICT Enterprise Insights delivers essential insight into the nature of demand and helps you more effectively target the market.

Contact us to request a demonstration.

ICT Spending Predictor
Detailed IT and communications spending profiles for 60,000 of the world’s largest enterprises, across 19 industries, and in 138 countries

Designed to revolutionize sales planning and target identification for technology and communications vendors, ICT Spending Predictor provides IT and communications spending estimations split by both function and technology category. The result of the most detailed, longest running and sophisticated program for delivering data of this type, this powerful data tool provides unparalleled intelligence for account prioritization and share of wallet analysis across 19 industries and 138 countries.

Use ICT Spending Predictor to:
- Gain a detailed understanding of the level of demand across both existing customers and prospects.
- Target the industries and geographies that offer the greatest opportunity for your organization.
- Prioritise accounts that sales and marketing should focus on.
- Build prioritised prospect lists by industry and geography.
- Analyze each of your prospect’s ICT spend by channel.
- Assess your share of wallet with each of your key accounts.

ICT Spending Predictor is will help identify your priority accounts and meet your growth targets.

Contact us to request a demonstration.
Data Tools

Contracts Analytics

IT Services Contracts Analytics

The most comprehensive, up-to-date guide to outsourcing contracts
The most comprehensive, up-to-date guide to outsourcing contracts signed within the global IT services market. The database tracks every publicly announced outsourcing deal worth over $1m signed in the marketplace, and contains over 22,000 IT services and BPO deals.

Use this service to:

→ Identify trends in outsourcing across vertical markets and geographies.
→ Discover which vendors are winning major deals.
→ Plan your sourcing strategy based on accurate information around market activity and industry comparison.

Banking Software Contracts Analytics

Analyze banking industry software contracts by institution, system area, vendor, and region
Understand trends and track latest investment by the banking sector on new industry platforms spanning across the front, middle and back office. Helps institutions to understand peer activity, and relative vendor market presence, providing an invaluable resource for sourcing, benchmarking and competitor intelligence.

Use this service to:

→ Monitor investment activity by region, country, institution, and vendor drilling down into 31 solution areas
→ The database contains over 7,000 deals from 2010 onwards tracking investment from selection to go-live.

Telco OSS/BSS Contracts Analytics

Analyze telecoms industry OSS/BSS contracts by company, system area, vendor, and region
Telco OSS/BSS Contracts Analytics service tracks the global OSS/BSS market by tracking publicly announced contracts by telcos segmented across customer, data, network, revenue, and service management. More than 6,000 contracts are accessible via an interactive dashboard, which highlights latest market activity and allows you to undertake trend analysis or isolate contracts by region, solution type, vendor, or company.

Use this service to:

→ View contract activity by region, type, buyer, and provider
→ Apply the custom features to create your view of market activity globally and drill down into contract level summaries

ICT Sales Prospector

The ultimate tool to empower vendor sales teams
Designed to help enterprise vendors accelerate their sales process, the ICT Sales Prospector blends ICT and business information to provide actionable leads. Built around a three step workflow it helps sales teams assess which industries offer the greatest revenue potential, quickly create targeted lists of companies, and then fully understand their prospects prior to making contact.

Use ICT Sales Prospector to:

→ Identify new prospects using a combination of ICT spending and demographic data
→ Apply ICT spend estimates by technology category to power share of wallet analysis for your key customers
→ Identify the likely areas in which organizations will spend their ICT budget with a breakdown by segment and channel
→ Estimate market size for specific services in a particular demographic group
→ Assess the strategy of your key targets with detailed SWOT analyses

Data on over 700 industries allows you to compare the whole industry landscape and assess the potential of each target market. Custom target lists can be quickly built from more than 800,000 organizations using 20 filters and 30 company fields including ICT spend data for 300,000 organizations and IT service contracts for 26,000. Comprehensive profiles are available for thousands of companies including SWOTs for leading players, giving you up to date insight on your key prospects.

Access to ICT Sales Prospector will empower your salesforce putting detailed and actionable information for thousands of organizations at their disposal.

Contact us to request a demonstration.
Data Tools

World Cellular Information Service
A Benchmark source of cellular market data

World Cellular Information Service (WCIS) has become the mobile market data benchmark for service providers and vendors across the globe. It provides historical and five-year forecast data for subscriptions, market share, and penetration for every operator, every network and every country market.

Further datasets provide detailed insight into service provider and network KPIs, licenses and spectrum auctions, ownership and investments, and handset features.

WCIS enables players to size and segment their markets, identify trends, understand market behaviour, and act on competitive threats.

Use WCIS to:

- Understand the size and rate of growth of every country market, technology, operator, and network.
- Assess the performance of networks, operators, and payment models to evaluate the health of each player and the tactics to succeed in each market.
- Identify which operators have acquired which licenses in each country market, including the spectrum and price paid.
- Assess service provider reach, scale, growth, and strategy across their global network portfolio.
- Identify the range of devices applicable to each network type and their specifications and features.

World Cellular Information Service is the only data source you need to succeed in mobile communication.

Contact us to request a demonstration.

World Broadband Information Service
The complete broadband and multichannel TV tracking resource

World Broadband Information Service (WBIS) provides constantly updated and accurate subscriber data and five-year forecasts on the fixed broadband industry worldwide. The service tracks the industry’s key areas including subscription statistics for fixed broadband, TV, and fixed voice, broadband forecasts, and operational and financial key performance indicators.

Use WBIS to:

- Establish the market trends and dynamics for each local market.
- Identify national and regional markets with the greatest growth potential by service.
- Track the performance of service providers across their regional and country markets with standardized key performance indicators.

World Broadband Information Service is the most comprehensive broadband and TV tracking tool available.

Contact us to request a demonstration.
A Complete Solution For Your Business

“Only Ovum places analyst interaction at the center of every subscription.”
Knowledge Center

Knowledge Center is Ovum’s powerful research portal.

Now with simplified search, a new data and forecast section, and improved navigation aligned to your market, it’s easier than ever to quickly find the insight you require.

The service includes a wealth of time-saving features that help you leverage our findings and connect with our experts:

→ Access on the move – optimized for desktop, tablet, and smartphone use
→ Comprehensive market data and forecast coverage - interact, analyze, extract
→ Ask an Analyst – put your questions to our analyst team
→ Create custom research alerts – set up weekly or monthly emails
→ Simple navigation, powerful search – find what you need quickly

Deliverables

Trends to Watch - Signature reports highlighting the key predictions and trends in business technology for the year ahead, providing invaluable information on the major issues to track.

Assessments - Independent assessment of a specific solution or service, examining features and capabilities, SWOT analysis, enterprise deployment considerations, and vendor’s product strategy.

Ovum Decision Matrix - Evaluates leading solutions within a horizontal or vertical technology area, assessing technology, execution, and market impact, and provides a comparative analysis and ranking.

Case studies - Short case studies with a strong core of information and analysis, highlighting best practices and pitfalls, and providing opinions on provider and solution capabilities.

On the Radar - “On the Radar” is part of Ovum’s series of research notes that highlights vendor solutions bringing innovative ideas, products, or business models to their markets.

Analyst report - Premium analysis reports providing in-depth analysis of key business technology issues - spanning strategy, technology selection, deployment, and management.

Surveys - Expert analysis of both quantitative and qualitative data from surveys undertaken with senior ICT decision-makers.

Opinion - Incisive analyst opinion on key market or technology events, providing a concise Ovum view, analysis of the key points, and recommendations for Ovum clients.

Research Notes - Insight on the most significant recent market developments. Research Notes provide a concise view of developments in a particular market, the implications, and actionable recommendations.
Unlocking competitive advantage in the digital economy.

There are now more complex questions to ask, and more of them, with disruptive technologies changing the rules of the game, and consumers’ expectations increasingly shaping new solutions and services.

Making growth strategies succeed

For digital service providers and their technology partners, Ovum provides unique insight into the sizeable but highly contested revenue opportunities within the connected digital economy. Ovum Consulting consistently delivers against our clients’ project objectives by combining longstanding TMT expertise with the most complete set of industry data available. With methodologies designed to deliver actionable advice, we have a proven track record of helping organizations make the business decisions required to drive growth.

1. Where to play: Identifying and assessing growth opportunities

We provide the insights and recommendations to help our customers understand:

→ The size of the opportunity and how it is forecast to change over time
→ Risks and challenges associated with a new market
→ Disruption potential of emerging technologies on models of distribution and consumption
→ Why this market represents a growth opportunity given our customers’ capabilities and strategy

We are able to provide a granular market view that allows our customers to focus their efforts on the most relevant and potentially lucrative areas of opportunity.

2. How to win: Exploiting the growth opportunities

Ovum enables our customers to go-to-market to exploit identified opportunities by advising on:

→ Market demand, how it is changing, and what is on the road to becoming a digital enterprise
→ The competitive environment and how others are supplying the market
→ The strengths and competencies necessary to claim a position in the market ahead of the competition
→ Potential future partners who can enable the exploiting of growth opportunities

Our market, competitor and channel insight gives our customers the bespoke, actionable insight necessary for them to achieve commercial success.

3. Why us: Positioning our service to deliver growth

We raise awareness of our clients’ position in the market and help them to gain maximum market exposure with customers, partners, and prospects through a range of content marketing services that can be tailored to specific messaging needs. These include:

→ White papers
→ Case studies
→ Thought leadership studies
→ Market surveys
→ Video marketing
→ Webinars
→ Infographics
→ Web marketing
→ Speaking engagements
→ Internal engagement workshops

By building our independent views into our customers’ marketing campaigns, we deliver an authoritative and credible voice that engages audiences, influences future buyers, and drives lead generation.

4. Who to target: Increasing sales effectiveness to drive growth

We help sales teams to build pipeline and drive revenue by prioritizing their efforts and supporting them in focusing on the specific objectives of buyers with insight into:

→ Customers’ buying habits and how they are changing
→ Customer ICT budgets in very real dollar terms
→ The business drivers for ICT investment

Detailed prospect profiles to help sales teams sell more effectively

Ovum’s proprietary data and custom research methodologies enable us to prioritize named customer and prospect accounts by granular ICT spend data, current supplier and investment strategy to provide your sales force with the tools to build in-year pipeline.

Common challenges that we address on a bespoke basis for our customers include:

- We need to evaluate target market segments and decide which are the most attractive to drive growth.
- We need to understand competitive landscape and how we should engage the market to win business.
- We need content marketing to raise awareness of our position in the market and demonstrate thought leadership.
- We need a more effective salesforce that can better focus its efforts based on account-level data and insights to build a fast pipeline.
What our customers have to say about us

“Ovum consultants’ technical expertise, global coverage of our market, and depth of analysis make for recommendations we can action immediately” - European Tier 1 telco

“Ovum shows a true understanding of the developed world.” - Indian value-added services provider

“Ovum consultants provide practical outcomes, based on deep subject matter expertise.” - US network solutions manufacturer

“Ovum is one of the few in their tier who cover SMEs.” - UK leading supplier of voice, data and mobile products and services

“Ovum is a leading player – they talk to the right operators, have a good view of the market, know their technology and give a realistic picture of what the market is saying.” - European Tier 1 network equipment manufacturer

Let us help you with your growth strategy. Contact Ovum Consulting.

Ask our analysts

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face sessions with our expert analyst team.

A central feature of all our subscription services, it’s invaluable when you need clarification, expert opinion or market context to support your decision making.

Gemma Bunting
Customer Experience Manager

Draw on our expertise to:
→ Gain further insight into our findings
→ Further explore our methodologies
→ Contextualize key market developments

We have engineered our response procedure to be fast, flexible and effective:
→ Each enquiry is prioritized via a senior analyst, dedicated to providing rapid first response
→ We can respond by email, telephone, or face-to-face, whatever your preference.

Consider our analysts an extension of your team, ready to support whenever the need arises.

We have senior analyst resource dedicated to managing our support service

Ovum provides the industry’s leading client support service, both in terms of response quality and timeliness. Direct interactions with our analyst teams are routinely cited by our clients as crucial in shaping and validating their business strategies.
For more information, please contact us:
enquiries@ovum.com
twitter.com/ovum
linkedin.com/company/ovum