ABOUT THE NEW OVUM

In May 2014, Ovum and Informa Telecoms and Media Research merged to create a single, market leading analyst house focussed on converging IT, telecoms and media markets.

01
UNRIVALLED DEPTH OF EXPERTISE ACROSS IT, TELECOMS, AND MEDIA

02
GLOBAL COVERAGE – 180 ANALYSTS IN 23 RESEARCH OFFICES WORLDWIDE

03
NO.1 TELECOMS INDUSTRY RESEARCH PROVIDER

We create tangible business advantage for our customers by providing actionable intelligence that can be relied upon in evaluating market and technology opportunities, benchmarking performance, and making better business-critical decisions.

Working with Ovum puts at your disposal:

- 180 analysts, each with on average more than 10 years’ industry experience
- the largest IT decision-maker survey
- 10,000,000+ market data points

We are part of Informa Group, the world’s leading provider of business intelligence. Informa has over 6,000 employees and delivers specialised information to companies operating in sectors including agriculture, consumer, commodities, energy & utilities, financial services, healthcare and pharmaceuticals, maritime, telecoms, media, and IT.

IT PRODUCT PORTFOLIO

SOFTWARE AND IT SERVICES

- IT Services
- Information Management
- Customer Engagement
- Consumer Technology
- Enterprise Mobility & Productivity
- Enterprise Communications
- Intelligent Networks
- Internet of Things
- Infrastructure Solutions
- Enterprise ICT Management

INDUSTRY TECHNOLOGY

- Retail Banking Technology
- Insurance Technology
- Payments Technology
- Government Technology
- Health Technology
- Education Technology
- Telecoms Operations & IT
- Media and Broadcast Technology
- Oil & Gas Technology
- Utilities Technology

DATA TOOLS

- ICT Enterprise Insights
- ICT Sales Prospector
- ICT Spending Predictor
- Software and IT Services Market Forecasts
- Ovum Interactive Decision Matrix
- IT Services Contracts Analytics
- Telecoms Vendor Contracts Analytics
- World Cellular Information Service
- World Broadband Information Service

In May 2014, Ovum and Informa Telecoms and Media Research merged to create a single, market leading analyst house focussed on converging IT, telecoms and media markets.
Welcome to the 2015 IT Research Agenda

Our position at the center of a converging ICT market, with a powerful combination of market data, expert analysis, enterprise insight, and client engagement, is enhanced for 2015 by significant investments in new products and services. We are launching dedicated new research channels for the Internet of Things and for Payments Technology, to help you capture business in these high-growth areas. We are investing in new trackers for software contracts in industry verticals, and extending our market forecasts for software, services, and industries. Finally, we are putting further focus on innovation, with an emphasis on the practical adoption of digital technologies, and a new series of case studies covering the business and industry impact of these changes.

For technology suppliers and advisors, Ovum IT delivers a corresponding end-to-end view of the technology market lifecycle. We help you to assess the size and nature of the market opportunity, and to plan product and service development paths that meet customer needs. As you take these solutions to market, we help you to develop compelling messaging, target granular market segments, and compete in individual accounts with the detailed intelligence to win business.

Thank you for your continued business, and we look forward to serving you in 2015.

TIM JENNINGS
Chief Research Officer, Ovum IT

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enquiries@ovum.com
Ovum IT

To compete effectively in the ICT market you need a research provider with comprehensive market coverage, deep industry influence, and the focus and agility of a market specialist.

OVUM IS AT THE CENTER OF THE ICT MARKET

We have a 360-degree view of the ICT market. We combine an understanding of IT vendors and their solutions, with deep insight into enterprise technology requirements and the demands of the industries in which they operate. Ovum helps leading technology service and solution providers find the most effective route to market. We also work with 20,000 global IT decision-makers each year. We enable them to formulate and implement IT strategies, and select the right technologies and solutions.

WHAT SETS US APART?

WE ARE ALIGNED TO YOUR ACTIVITIES; WE SUPPORT YOUR COMMERCIAL DECISIONS

<table>
<thead>
<tr>
<th>YOUR ACTIVITIES</th>
<th>OUR SERVICES</th>
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<td>Strategic market outlook</td>
<td>Trends to Watch reports</td>
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<td>Business strategy</td>
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<td>Product development</td>
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<td>ICT Opportunity Prospector</td>
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<td>Content marketing</td>
<td>Whitepapers and webinars</td>
</tr>
</tbody>
</table>

Ovum helps ICT vendors:
- assess the opportunity
- target the market
- compete to win business

Whether you need insight to support strategic planning, product development, or your go-to-market strategy, Ovum provides solutions that will save you time, reduce risk, and help increase your revenues.
As markets become more competitive and margins tighten, our customers’ requirements for market intelligence have become ever more exacting. Insight and data must be reliable and relevant, and available across a breadth of markets but also timely and tightly focused. Traditionally, these are attributes of different providers:

Large providers can deliver:
- broad coverage and a complete research portfolio
- consistent methodologies and market segmentation
- IT decision-maker influence across industries.

Specialist providers can deliver:
- a service tailored to your needs
- fast access to senior analysts
- agility in tracking emerging technology markets.

Only Ovum is able to combine these to deliver the reach, accessibility, and service you need.

WE DELIVER A UNIQUE BLEND OF RESEARCH, DATA, DIRECT ANALYST ENGAGEMENT, AND CONSULTING

Ovum provides research, data, direct analyst access, and custom consulting across our full research portfolio:

Expert market analysis
Ovum has long-standing expertise and dedicated resource in horizontal technology and industry technology. Our market experts do not work in silos, but collaborate across domains to provide a complete and comprehensive market view.

Robust market data
Market data is the foundation of our research. Ovum’s scale allows us to undertake large-scale primary research, and deliver a series of data tools supporting your activities from strategic planning through to account-level engagement.

Direct analyst access
We understand that you expect direct access to senior market experts. As part of all our subscription services we provide rapid access to the analysts with the expertise to help you, without any bureaucracy. We encourage our clients to consider our analysts an extension to their business.

Research-based consulting
We provide the most agile and responsive research-based consulting service available. Ovum has proven experience in delivering complex projects for some of the largest IT vendors, with over 2,000 engagements completed last year.
The convergence and pervasive presence of IT, communications, and Internet technologies is at the forefront of business and society, and requires organizations of all types to develop or extend their technology capabilities.

OVUM IDENTIFIES 8 SUPER THEMES THAT REFLECT THE CHANGING TECHNOLOGY LANDSCAPE:

Transform IT capability. Reshaping the IT organization and repositioning the role of IT within the business, to remain competitive in the modern digital economy

Modernize legacy systems. Continuously updating infrastructure, networks, platforms and applications to enable the rapid delivery of business-centric services

Build the modern workplace. Adopting next-generation mobility, collaboration and productivity tools to meet the needs of an empowered workforce

Manage security, identity and privacy. Creating an effective framework to proactively counter cybersecurity threats, manage digital identities, and maintain data privacy

Adopt cloud services. Managing the transition of ICT delivery from an on-premise to a cloud-based on-demand model

Connect the physical world. Taking advantage of the emerging internet of things to transform front- and back-office processes, connecting the physical and digital environments

Exploit business information. Enabling the organization to use big data and analytics as change agents for digital transformation

Enhance customer experience. Combining multiple data sources and interaction types to deliver and monetize a seamless multi-channel customer experience
IT Services

Assess and understand how large and midsize IT services providers are working with customers to drive their IT transformation agendas, tailored to their specific vertical industry needs, through a combination of IT consulting, infrastructure and cloud services, application modernization, business process outsourcing (BPO), offshore strategies, and systems integration.

The IT services market is one of the most hypercompetitive in IT. Providers are struggling to keep pace with customers’ constantly changing requirements, which often encompass new market trends such as cloud, mobility, and analytics. This accelerated pace of change is also forcing vendors to rethink and adapt their current business models, and/or create new ones, in order to grow their revenues and avoid marginalization. In addition, both large and midsize providers are searching for better ways to differentiate their portfolios, services, vertical expertise, and ecosystem partnerships, to beat the competition across various regions.

GEOPHICATION SPREAD OF APPLICATION MANAGEMENT SERVICES CONTRACTS ANNOUNCED OVER THE PAST 12 MONTHS

Source: Ovum
HOW WE HELP:

ASSESS THE OPPORTUNITY:
- **IT Services Market Forecasts** – A five-year view on growth in the IT services market, segmented by vertical, region, and IT services type.
- **Trends to Watch** – Signature reports highlighting the key predictions and trends in IT services for the year ahead.

TARGET THE MARKET:
- **Business Trends Surveys** – Annual, multi-region customer surveys across major vertical industries on key IT services trends including CRM and cloud services.
- **On the Case** – Targeted customer case study deliverables on new and innovative use of IT services within the enterprise, with lessons learned and best practices.
- **Ovum Decision Matrix** – Comparative evaluation of the leading enterprise IT services with specific vendor drill-downs.
- **ICT Enterprise Insights** – Survey of over 6,500 ICT decision-makers, providing executive perspectives on business/IT drivers, investment priorities, selection criteria, sourcing, and vendor preferences.

COMPETE TO WIN BUSINESS:
- **IT Services Contracts Analytics*** – The most comprehensive guide to the global IT services market, which tracks every publicly announced outsourcing deal worth over $1m and contains more than 23,000 IT services and BPO deals.
- **ICT Sales Prospector*** – Helps vendor sales teams to assess industry revenue potential and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

*available separately – see Data Tools p. 48-51

KEY THEMES FOR 2015:

1. **Leading with IT services for transformation**
Enterprise customers increasingly seize on transformation as a core element of their IT services engagements, whether short term and tactical or longer term and strategic. It’s no longer about maintaining the status quo or making incremental improvements; it’s about game-changing projects on IT systems and business processes.

2. **Sourcing and managing cloud services in a time of transition**
Cloud is having an impact on the way IT services are sourced and business processes supported, especially as customers focus more on hybrid IT management. The transition to cloud-based infrastructure is pervasive. For enterprises, it offers the opportunity to reduce costs and investment in depreciating assets, and deliver more responsive IT.

3. **Modernization: Continuous change is the new normal**
Modernizing IT as an enterprise is not an open-and-shut case – it’s now a strategic imperative with a constantly changing set of requirements and business needs that impact infrastructure, application and BPO services.

4. **The managed security services opportunity**
Security threats are getting more sophisticated and harder to detect; the volume of threats is growing exponentially; new technology in the shape of “bring your own device” (BYOD), mobile apps, and social media is bringing new challenges into the workplace; and there’s a lack of resources and skills to deal with these problems. There is growing demand for managed security services from enterprises that need to augment in-house skills.

5. **Service integration and automation: Moving from cutting-edge to core**
Concepts around service integration, management and automation are nascent, but behind the scenes, many IT services providers are making investments to enable these concepts in the future. Customers will come to appreciate them once the benefits become clear. The fundamental question is: What is the next big thing in service delivery after labor arbitrage?
Information Management

Learn how new models of data analysis are emerging, as a result of a changing data landscape, new technology, and an intensified executive focus on the value of data. Understand the process by which data (in all its forms) can be refined from raw commodity to valuable business insight.

EPM, BI, and analytics clearly remain high-growth markets. We forecast continuing expansion in 2015 and beyond, driven by two major factors. The first is expanding the reach of BI and analytics to encompass the growing volume and variety of data, driving significant adoption of Big Data technologies and the interest of investors in vendors offering these solutions. Second is the changing dynamic of interaction between users and technology. The consumerization of analytic technologies – best evidenced by advances in self-service capabilities, often enabled by cloud delivery – is likely to bring in the next multi-million users to data analysis technologies.

OVUM DECISION MATRIX FOR ENTERPRISE PERFORMANCE MANAGEMENT

Source: Ovum
HOW WE HELP:

ASSESS THE OPPORTUNITY:

- **Software Market Forecasts** – A five-year view on growth in the information management market, segmented by vertical, region, and function, and updated annually.
- **Trends to Watch** – Signature reports highlighting the key predictions and trends in business technology for the year ahead.

TARGET THE MARKET:

- **Ovum Decision Matrix** – Comparative evaluation of the leading enterprise technology solutions, accompanied by individual SWOT assessments. Recent evaluations have included BI suites and enterprise performance management solutions.
- **Ovum Interactive Decision Matrix** – Interactive models providing competitive intelligence for vendors, and enabling enterprise clients to weight their own criteria and generate a personalized recommendation.
- **On the Radar** – Brief assessments of emerging vendors in the information management market.
- **ICT Enterprise Insights** – Survey of over 6,500 ICT decision-makers, providing executive perspectives on business/IT drivers, investment priorities, selection criteria, sourcing and vendor preferences.
- **Case studies** – Recommendations, best practice, and advice from real-world solution deployments.

COMPETE TO WIN BUSINESS:

- **ICT Sales Prospector** – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists with detailed company information.
- **ICT Spending Predictor** – Provides detailed ICT spending profiles to assist with list building, target identification, and share-of-wallet assessment.

NEW PRODUCTS 2015:

- Expanded market forecasts for information management
- Enterprise maturity model for information management
- Trackers for information management software contracts
- Ovum Decision Matrix for Hadoop distributions

KEY THEMES FOR 2015:

1. **Data everywhere: managing and governing the data mosaic**
   
   Data’s heritage has been defined by attempting to impose structure in order to manage and analyse it. Its future is unstructured, connected, and mobile; the challenge of physically managing, governing, and securing data in this future demands a fundamental re-assessment of long-held views of best practice.

2. **From data to insight: refining the new oil**
   
   Understanding the process by which data, in all its forms, can be refined from raw commodity to valuable insight needs to encompass the old and the new. In meeting this dual challenge approaches must provide for both the basic functionality to satisfy the essentials of MI & dashboards, and the potential offered by advanced analytics delivering Big Data and predictive insights.

3. **Pervasive analytics: putting data-driven insight in reach of everyone**
   
   Traditionally categorized as high-cost, inaccessible, and slow, information management is evolving, offering the potential to change the way people work. The emergence of lower-cost, easier-to-use, and faster analysis tools utilizing simplified data integration, cloud delivery, and visual analytics are helping non-expert users infuse data-driven insight into everyday business decisions.

*available separately – see Data Tools p. 48-51
Customer Engagement

Understand how businesses use different channels to engage with customers, thereby maximizing and monetizing the value of the customer relationship. Learn how enterprises can track customers and influence their behavior, and how vendor suppliers can evolve their tools to make this process simpler and more efficient.

Customer engagement spans multiple technology platforms, meaning vendors from separate sectors quickly cross into adjacent areas. The emergence of mobile as the dominant channel of customer contact has opened up new areas: analytics, to understand customer trends; cross-channel communications tools; and cloud-based platforms that are more flexible. The traditional suite of platforms and applications that drove customer interactions when they were primarily voice-based has given way to a complex amalgamation of IT, marketing, and support-based systems that have to be integrated more effectively than in the past. Vendors that don’t simplify their user experiences and/or break down silos are at a competitive disadvantage.

Enterprises are faced with an unusually fast-changing operating environment. Traditional technological solutions do not keep pace with the onslaught of new ways of doing business, which encompass mobile, apps, and social media, and make it difficult to track customers as they engage across multiple touchpoints. In order to keep pace, enterprises must evaluate and acquire many new and unfamiliar technologies; to beat the competition, they need to embrace customer experience as a differentiator and risk failure. Questions that emerge include: How can enterprises track customers and influence behavior? How can they monetize the relationship more fully? What are best practices for improving customer experiences across different industries and geographies?

### MULTI-CHANNEL CUSTOMER SERVICE

<table>
<thead>
<tr>
<th>TYPE OF SERVICE</th>
<th>SELF-SERVICE</th>
<th>CUSTOMER ASSISTED SERVICE</th>
<th>AGENT ASSISTED SERVICE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CHANNELS</strong></td>
<td>IVR, web, social media, automated SMS, web chat</td>
<td>social media communities, forums, in person</td>
<td>telephone, email, SMS, web chat, in person</td>
</tr>
<tr>
<td><strong>IDEAL QUERIES</strong></td>
<td>- Review shipping information</td>
<td>- Understand technical issues</td>
<td>- Manage account fraud</td>
</tr>
<tr>
<td></td>
<td>- Check balance</td>
<td>- Report service outages</td>
<td>- Cancel a service</td>
</tr>
<tr>
<td></td>
<td>- Refill account</td>
<td>- Compare products and prices</td>
<td>- Discuss billing issues</td>
</tr>
<tr>
<td></td>
<td>- Book appointment</td>
<td></td>
<td>- Receive healthcare results</td>
</tr>
<tr>
<td></td>
<td>- File insurance claim</td>
<td></td>
<td>- Report a product fault</td>
</tr>
</tbody>
</table>

Low complexity | High complexity
KEY THEMES FOR 2015:

1. Monetizing the customer experience through collaboration
   Enterprises are translating what their service experts know (the how and why of interacting with customers) into processes that bind the entire enterprise with shared goals and best practices. If done properly, collaboration can extend the lifetime value of customers and turn them into brand advocates.

2. Understanding the “conversational wave” of marketing communications
   Traditional digital marketing communications are becoming less effective as the volume of marketing communications increases and perceived product and service differentiation decline. Vendors that can roll these communications together into timely, personalized, and highly relevant “conversations” between enterprises and their customers will be highly sought after.

3. Accelerating customer interactions with real-time analytics
   Enterprises are turning to real-time analytics to provide immediate guidance to service reps in their customer interactions. Enterprises need tools to be able to pinpoint key, decisive moments in the customer journey in order to make the best use of these tools.

4. Managing digital customer interactions in the contact center
   Social media and smartphones continue to impact the way in which customers communicate with businesses. Contact centers must continue to evolve and improve their channel options. Vendors need to develop their multichannel capabilities with customer requirements in mind.

HOW WE HELP:

ASSESS THE OPPORTUNITY:
- Software market forecasts – A five-year view on growth in the Customer Engagement market, segmented by vertical, region, and function, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in business technology for the year ahead.

TARGET THE MARKET:
- Ovum Decision Matrix – Comparative evaluation of the leading enterprise technology solutions, accompanied by individual SWOT assessments. Coverage includes customer interaction analytics, hosted multichannel contact center platforms, digital marketing solutions, and CRM.
- Ovum Interactive Decision Matrix – Interactive model providing competitive intelligence for vendors, and enabling enterprise clients to weight their own criteria and generate a personalized recommendation.
- On the Radar – Brief assessments of emerging vendors in the customer engagement market.
- ICT Enterprise Insights – Survey of over 6,500 ICT decision-makers, providing executive perspectives on business/IT drivers, investment priorities, selection criteria, sourcing, and vendor preferences.
- Case studies – Recommendations, best practice, and advice from real-world solution deployments.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential and quickly create targeted lists with detailed company information.
- ICT Spending Prospector* – Provides detailed ICT spending profiles to assist with list building, target identification, and share-of-wallet assessment.

NEW PRODUCTS 2015:
- New coverage of customer journey mapping systems and processes.
- Diagnostic tools for enterprises to identify promising technologies.
- Expanded market forecasts for customer engagement technologies.
- Integrated coverage across marketing, contact center, and digital engagement tools.

*available separately – see Data Tools p. 48-51
Evaluate the size of the connected device market, including handsets, tablets, smart TVs, set-top boxes, media streamers, PCs, and wearables. Learn how to create, support, and take advantage of the software and hardware ecosystems and corresponding business models. Track upcoming disruptive technologies and keep up with the fast pace of innovation set by the industry.

The unexpected revival of laptop sales in mature markets throughout 2014 has shown the complexity of the dynamics that affect multi-device ownership trends and purchase behaviors. This puts immense pressure on supply chains and requires stakeholders to rethink their short- and long-term strategy on an almost biannual basis.

Innovation in the consumer technology industry is evolving at a staggering pace. The wearables market is a good example, with new devices launching almost every day. Market leadership is difficult to sustain in this environment. Technology giants such as Samsung, Microsoft, and Sony are increasingly being thrown off balance by small start-ups from Europe and China.

The home and the office are set to endure huge transformations in the next five years, from the emergence of smart appliances to the wide adoption of cloud-based storage and processing. This will have massive implications for the devices and services consumers use.

**HOME ENTERTAINMENT DEVICES FORECAST SEGMENTATION**

<table>
<thead>
<tr>
<th>Device types</th>
<th>Connectivity</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>Global, regional and country-level forecasts</td>
<td>Revenue ($bn)</td>
</tr>
<tr>
<td>Installed Base</td>
<td></td>
<td>Sales</td>
</tr>
<tr>
<td>Households</td>
<td></td>
<td>Installed Base</td>
</tr>
<tr>
<td>TV set</td>
<td>Unconnectable / Non-smart</td>
<td>SD</td>
</tr>
<tr>
<td>TV settop box</td>
<td>Connectable / Smart</td>
<td>HD</td>
</tr>
<tr>
<td>Media player</td>
<td>Connected</td>
<td>3D</td>
</tr>
<tr>
<td>Media streamers</td>
<td>Unconnected</td>
<td>4K</td>
</tr>
<tr>
<td>Games console</td>
<td>Unconnected</td>
<td>Ready</td>
</tr>
<tr>
<td>PC</td>
<td>Connected</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Topics:**
- 4K devices
- Business models
- Connected devices
- Connected home
- Connectivity enablement
- Consumer behavior
- Device availability and distribution
- Device ecosystems
- Device features and specifications
- Disruptive technologies
- M2M and IoT
- Media streamers
- Multi-device ownership
- Multi-screen
- Operating systems
- PCs and laptops
- Purchase habits
- Set-top boxes
- Smart bands
- Smart devices
- Smart glasses
- Smart home
- Smart TVs
- Smart watch
- Smartphones
- Tablets
- Technology adoption
- Wearable devices
HOW WE HELP:

ASSESS THE OPPORTUNITY:

- **Forecasts for all major device segments** – Our datasets offer historic and forecast data for fixed and mobile device segments, including:
  - mobile devices (handsets and tablets)
  - personal computers (laptops and desktops)
  - home entertainment devices (TV sets, set-top boxes, media players, games consoles, and media streamers)
  - machine to machine (consumer connections and revenues)

TARGET THE MARKET:

- **Understanding end users**:
  - Multi-device ownership trends
  - Connected TVs
  - Wearable purchase intentions
  - Replacement cycles

- **The Smart Wearable Device Tracker report series** – We monitor new wearable device launches, use cases, features, and retail price

- **The World Cellular Handset Tracker report series** – We track handset launches and pricing by operator, detailing the wider technical features of every handset within selected key developed and developing markets.

- **Consumer Technology Readiness Index report series** – We monitor the evolution of consumer technologies with regards to their addressable market, consumer perception, and industry support.

COMPETE TO WIN BUSINESS:

- **Case studies of industry best practice** – These detailed reports identify and analyze ground-breaking strategies in the consumer technology space. Each case study examines the business model, market positioning, results, and strategic outlook for the strategy in question, and provides conclusions and recommendations.

- **ICT Sales Prospector** – Helps vendor sales teams to assess industry revenue potential and quickly create targeted lists with detailed company information.

*available separately – see Data Tools p. 48-51

NEW PRODUCTS 2015:

- **The Smart Wearable Device Tracker report series** – Tracking device launches, use cases, features, and prices

- **Wearable Devices forecast data and report** – Five-year forecasts for the wearable devices market including smart watches, smart bands, smart glasses, and other types of wearable.

- **Consumer-led Innovation: Opportunities and Challenges** – Analyzing the increasing influence consumers have on technology innovation, development, and adoption via new tools and services such as crowdfunding.

- **TV Technology Evolution: OTT Impact** – In-depth analysis of the impact media streamers such as Google’s Chromecast, Apple TV, and Roku will have on the traditional TV devices market and smart TV connectivity attachment rates.

KEY THEMES FOR 2015:

1. **Converged device ecosystems**
   Consumer demand for services to work seamlessly across PCs, smartphones, tablets, TVs, and other devices is driving the emergence of converged device ecosystems. We monitor and analyze multi-device ownership trends and their impact on consumer behavior.

2. **Consumer-driven technology**
   Social media sharing, crowdfunding, and e-commerce adoption mean that continuously communicating with customers has never been so critical. We assess the actual influence consumers have on technology and how it affects their purchase intentions.

3. **Disruptive technologies**
   From ultra-high definition video content to fitness tracking, use cases and applications are driving the emergence and adoption of new consumer technology. We track disruptive technologies through case studies from around the world.

4. **Consumer technology economics**
   E-commerce companies such as Amazon are selling their own mobile devices, and leading smartphone manufacturers such as Apple are providing their own payments platforms. We analyze how side business models and parallel industries affect traditional device and content value chains.

5. **Smart home threats and opportunities**
   The future of living will be smart. We provide a future outlook on connected-home devices and ecosystems, and their impact on service providers and device manufacturers.
Enterprise Mobility & Productivity

Learn why having a mobile, connected, and collaborative workforce is vital for process efficacy, business transformation, and enduring competitive advantage. Understand the impact of vendor products, solutions, and strategies through Ovum’s holistic coverage of people, process, and technology as they come together in the new digital workspace.

Mobility is now a core channel for IT services, for delivery both within and beyond the organisation. The evolution of mobile device technology will continue to drive enterprise demand for productivity tools: organizations want business scale and stability, with consumer look and feel. Many enterprises struggle to keep pace with changing technology or use it to deliver strategic benefit to the business. A host of software vendors and IT services providers offer a range of “mobile” products, but any vendor that can reach beyond a technical discussion to offer solutions to business challenges will make headway over those vendors focusing on the technology alone.

EMPLOYEE PREFERENCES FOR DEVICE TYPES AND COMBINATIONS OF DEVICES USED AT WORK

Source: Ovum
HOW WE HELP:

ASSESS THE OPPORTUNITY:
- Software Market Forecasts – A five-year view on growth in the enterprise mobility and productivity market, segmented by vertical, region, and function, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in business technology for the year ahead.

TARGET THE MARKET:
- Ovum Decision Matrix – Comparative evaluation of the leading enterprise technology solutions, accompanied by individual SWOT assessments.
- Ovum Interactive Decision Matrix – Interactive models providing competitive intelligence for vendors.
- On the Radar – Brief assessments of emerging vendors in the enterprise mobility and productivity market.
- ICT Enterprise Insights – Survey of over 6,500 ICT decision-makers, providing executive perspectives on business/IT drivers, investment priorities, selection criteria, sourcing, and vendor preferences.
- Case studies – Recommendations, best practice, and advice from real-world solution deployments.
- Employee mobility survey – Annual survey of 5,000 enterprise workers that helps clients to understand key trends in the bring-your-own-device arena, segmented by industry, country, and job role.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists with detailed company information.
- ICT Spending Predictors* – Provides detailed ICT spending profiles to assist with list building, target identification, and share-of-wallet assessment.

*available separately – see Data Tools p. 48-51

KEY THEMES FOR 2015:

1. Re-platforming the digital worker
   Today’s enterprise worker is moving from a desktop-only, end-user computing environment towards a device-agnostic, more user-centred one. This enables the employee to use any sanctioned device to access applications and data from any location, increasing their engagement and improving productivity and efficacy as a result.

2. Delivering a consistent digital workspace experience
   The combination of mobile devices and cloud services presents a real opportunity to fundamentally re-think business processes, and to alter the way work gets done. In addition, communication and collaboration can be extended well beyond the traditional desk-based employee and the corporate network, to ensure that there is consistent enterprise collaboration driving better business outcomes.

3. Unified device and application management
   With the business outcome being improved productivity, the digital worker is starting to expect an “always-connected” workspace, where they can access their work applications irrespective of device or location. However, an organization must address the management of the myriad of corporate-owned and personally-owned devices and applications, including tablets, smartphones, and PCs, in use in the enterprise to enable this always-connected workspace.

4. Evolving architecture: from “mobile first” to “API first”
   The drive towards “mobile first” by many vendors has helped to raise awareness of the importance of mobile devices as a channel, but it has done so at the cost of focussing too much on the client device, and not enough on the provision of an open architecture that can support any client. The emergence of “API first” shifts the focus away from the client back to the middle tier in order to promote the development of services that can be consumed by any application wherever it is hosted. “API first” is fundamentally about building the right architecture, putting the application or the data first, and delivering on the original promise of SOA.

NEW PRODUCTS 2015:
- Expanded market forecasts for collaboration applications
- New market forecasts for enterprise mobility management
- Trackers for enterprise mobility and collaboration software contracts
Enterprise Communications

The enterprise market for telco-led services will continue to grow, but this growth will come from different services and new regions. Our Enterprise research channel enables you to understand and exploit the shifts in demand for selling communications and IT services to businesses and public-sector organizations.

The network is being transformed
Telcos are positioning their networks as the foundation for a set of business-critical infrastructure, communications, application, and information services. The market is more services-oriented than ever, but does that mean telcos will take a decent share of value-added services revenues?

Services are evolving at an ever-faster pace
Service providers are rolling out advanced cloud services. They are helping companies connect people to people, and machines to machines. Telcos have broader service portfolios than ever, but many of them are struggling to differentiate their offers from those of competitors.

The buyer is more demanding
Enterprise buyers are more sophisticated and demanding than ever. They want service levels across the network through to applications, reporting, integrated billing, and service management. At the high end, deals are getting larger, and there is more bundling now compared to just a few years ago.

OVUM DECISION MATRIX: SELECTING AN M2M SERVICE PROVIDER IN ASIA-PACIFIC, 2014–15

<table>
<thead>
<tr>
<th>Company</th>
<th>Overall strategy assessment score</th>
<th>Overall technology assessment score</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT&amp;T</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>China Mobile</td>
<td>7</td>
<td>6</td>
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<tr>
<td>China Telecom</td>
<td>5</td>
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<tr>
<td>Orange Business Services</td>
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<td>7</td>
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<tr>
<td>Orange</td>
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<tr>
<td>Singtel</td>
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</tr>
<tr>
<td>Telstra</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Telenor</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Vodafone</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>NTT</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Ovum

Industry Verticals:
- Automotive
- Financial service
- Healthcare
- Internet of Things (IoT)
- Machine-to-machine (M2M)
- Oil and gas
- Public sector
- Retail
- Utilities
NEW PRODUCTS 2015:

- Machine-to-Machine Monitor – Track the activities of telcos and M2M providers.
- 5-Year Forecast: Telco Cloud Services – Covering telco IaaS, PaaS, and SaaS.
- 5-Year Forecast: Telco ICT Managed and Outsourced Services – A five-year forecast covering large enterprise managed and outsourced services, segmented by type, geography, industry, and company size.
- Segmentation Strategies reports – Go-to-market strategies for telcos.
- Case studies – Real enterprise UC experiences.

KEY THEMES FOR 2015:

1. **Multinational and corporate services**
   MNCs are procuring more and more ICT services from telcos. We track service provider contracts with MNCs, and advise MNCs and corporates on benchmarking and provider selection.

2. **SME and SoHo services**
   We understand SME requirements and provide case studies for success.

3. **Vertical industries**
   The ICT opportunity is also a vertical opportunity. Our enterprise vertical analysts provide insight into industry-specific drivers.

4. **Unified communications**
   True multichannel interaction is now available as managed and cloud services. The new world of UC includes video, BYOD, and cloud communications services. Our telco UC services coverage delves into the detail of how service providers bring UC, from voice to video, to market.

5. **Mobile workspace**
   BYOD and mobile consumer applications have provided a catalyst for organizations to mobilize IT and business processes. Telcos have recognized this trend and are repositioning as enablers of a “work anywhere” approach.

6. **Cloud and data center**
   As corporates move their workloads to the cloud, telcos have struggled to compete with the likes of Amazon Web Services and IBM. Telcos are using the network to position themselves as cloud brokers. Will this approach meet with success?

7. **Connectivity**
   The network will increasingly be procured as and when required, as a service. We focus on how telcos are selling advanced network services as value-adds and supporting global connectivity requirements.

8. **M2M and IoT**
   In the machine-to-machine – and larger Internet of Things – value chain, telcos will undoubtedly play a role in managed connectivity. Our M2M trackers and forecasts illustrate how some telcos are building out their services.

HOW WE HELP:

**ASSESS THE OPPORTUNITY:**
- Forecasts for major enterprise services – From network to voice and data, through to M2M, managed services, and cloud. With granular splits for company size, geography, and industry vertical.

**TARGET THE MARKET:**
- Enterprise Insights survey – Covering both large enterprises and SMEs in 15 country markets. Topics include budgets, decision-making, connectivity, mobility, UC, cloud, consumerization, bundling, and supplier selection.
- Hot topic reports – On service developments, including managed security, video, SDN, and cloud services.
- Decision Matrices – Comparisons of telco service offers in select domains, including M2M, security, and mobile workspace.
- Case studies – Explications of real enterprise experience in evaluating, selecting, implementing, and measuring benefits from advanced UC and other services.

**COMPETE TO WIN BUSINESS:**
- Telecoms Cloud Monitor – Track and assess telco cloud service launches, partnerships, and deals.
- Global Services Deals Analysis – We track major enterprise service deals, producing TCV shares every six months.
- Machine-to-Machine/IoT Monitor – Track and assess the activities of telcos and key M2M providers across the spectrum of IoT applications.
- Service Provider Snapshots – Understand the enterprise services strategies, portfolio evolution, and commercial success of the top 15 global services providers.
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists with detailed company information.

*available separately – see Data Tools p. 48-51
Intelligent Networks

Understand how network assets can support operator business models through improved efficiency and service monetization. Evaluate the future of the network as operators strive to meet surging demand for high-speed broadband services against a backdrop of strong price competition.

In 2014 telecoms operators restated their belief that the network can provide a competitive advantage. Capex as a percentage of turnover rose in many markets.

In 2015 operators will become more demanding. Vendors will increasingly need to deliver intelligent networks that can scale more economically and react in real time to shifts in traffic and subscriber and application requirements. Software-centric networks will change how technology is procured, how networks are built and operated, and how services are delivered.

The rollout of high-speed fixed and mobile broadband access networks will continue apace. In fixed networks a plethora of new and emerging technologies will give fixed operators the opportunity to deliver ultra-fast broadband connectivity without upgrading the copper inside the customer premise. 2014 represented the peak year in terms of LTE launches, and 2015 will see many of these networks upgraded to LTE-Advanced. With the rapid in-market consolidation of fixed and mobile operator businesses, developing integrated network strategies is going to be a priority for operators and their suppliers.

Other key issues for the network equipment vendor community in 2015 will include: continuing to build expertise in IT services to help telecoms operators with their transformation projects; developing strategies to support IoT and M2M services; understanding the evolution of data centers and their role in carriers’ enterprise businesses; and mapping the evolving competitive landscape that will result from the adoption of cloud technologies.

CSP SURVEY*: THE SHIFT TO SOFTWARE-CENTRIC NETWORKS: A MARATHON, NOT A SPRINT

Q. “CSPs which are building their own data centers, or buying data center/cloud operators, are more prepared than other CSPs to cope with software’s rise in the network.”

*In=118

Source: Ovum

MARK NEWMAN
OVUM CHIEF RESEARCH OFFICER

Topics:
- 100G optical networking
- 5G
- Backhaul and fronthaul
- Data centers
- Capex/logics
- Carrier WiFi
- Centralization
- Efficiencies
- FTTP
- IMS
- LTE
- Network optimization
- M2M networks
- Managed services
- Network sharing
- Network vendor strategy
- Next-generation access
- Operational transformation
- PON
- SDN and NFV
- Small cells
HOW WE HELP:

ASSESS THE OPPORTUNITY:

- Quarterly supply-and-demand analysis, including vendor market share – We produce roughly 20 market share and CSP revenue/capex/opex reports each quarter. Quarterly vendor share analysis includes fixed and mobile access, optical and packet transport and services.

- CSP capex tracker and analysis – Ovum’s quarterly capex spreadsheet tracks capital spending by all large telcos worldwide and includes country and regional totals. This data is used as the basis for five-year capex forecasts.

TARGET THE MARKET:

- Vendor contract tracking and analysis – Available as an Excel file or an interactive premium tool, Ovum adds hundreds of contracts a month to our list of over 14,000 supplier-buyer announcements across a wide range of infrastructure and ICT service segments.

- On the Radar and vendor profiles – In-depth profiles of large network equipment vendors, IT companies offering cloud solutions to operators and early-stage disruptive technology companies in areas such as NFV, 5G and energy efficiency.

- WLAN deployments and forecasts – Ovum’s public WLAN hotspot tracker is a dataset that shows telco WLAN deployments worldwide. This data is used as a key input for our five-year Wi-Fi hotspot forecast.

- Data centers – Ovum’s Global Data Center Analyzer provides details of 6,000 data centers globally.

- 5G technology assessment and evolution – Ovum tracks the emergence of 5G technologies within different industry forums and looks in detail at some of the early-stage technology companies contributing to the standardization process.

- ICT transformation – Ovum will continue to track and analyze the increasing number of telecom/IT operational transformation and centralization projects.

COMPETE TO WIN BUSINESS:

- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists with detailed company information.

*available separately – see Data Tools p. 48-51

KEY THEMES FOR 2015:

1. Telco cloud and ICT services
   While the adoption of cloud technologies in the telecoms network is inevitable, precisely where and when the transition will take place remains unclear. In 2015 we will take a close look at solutions being offered by network equipment vendors and IT vendors large and small.

2. Telco capex trends
   We track telecoms operator capex on a quarterly basis and generate five-year capex forecasts. We also track quarterly revenue and market share for a full range of network segments.

3. Fixed-mobile integration
   As the integration of fixed and mobile operators gains momentum, strategies for building an integrated core and implementing a fiber rollout that meets the requirements of both the fixed and radio access business are coming to the fore.

4. The role of the network in the IoT
   What can operators do to monetize IoT traffic, and what network services and capabilities can they offer IoT device vendors and service providers?

5. OTT networks and technology strategies
   A handful of Internet companies now account for a significant proportion of all the network traffic generated globally. In 2015 we will produce a series of in-depth profiles of OTT players and network and technology strategies.

6. Enabling pricing innovation
   A new breed of companies has emerged that has started to use cloud technology to enable innovative new data pricing approaches.

7. Inside the data center
   The transition to telco cloud will see data centers become an integral part of the network. In 2015 we will take a closer look at what is happening inside data centers and the strategies of the companies building them.

NEW PRODUCTS 2015:

- Profiles of the network and technology strategies of OTT players and other digital information providers
- A Decision Matrix for operators seeking to deploy innovative data pricing capabilities
- Five-year forecasts for managed network services, fixed broadband and radio access networks
- VoLTE and VoWiFi deployment strategies report and five-year forecasts
- Five-year forecast for telecoms cloud services (NFV/SDN)
- Report on front-haul
Internet of Things

Learn to define and dimension the Internet of Things (IoT). Assess the roles within the IoT and understand the business models enabled by it. Evaluate key application verticals, quantify vital technology markets, and understand the strategic goals of leading IoT participants.

The Internet of Things is a buzzword. Its definition and constituents are expanding and evolving. All of the companies involved in the establishment of today’s ICT service infrastructure believe they have a pivotal role to play in the IoT. However, few accurately know what that role will be, or have a realistic estimation of the size of the opportunity.

The IoT is beset by far more questions than answers. It is a hive of seemingly contradictory developments. The interconnectivity of the world around us will be a combination of the ad-hoc with the deliberately structured. The enablement of the underlying fabric of society through connectivity will be both transformative as well as barely noticeable should it be executed correctly.

Effectiveness and efficiency will be the operative words for the IoT. This will be true for the enabling technology and service providers of the ecosystem, the businesses and organisations that they serve, and the human populations that will ultimately benefit. Many business models are actually likely to remain the same. The critical difference is that the IoT will enable organizations to do what they do far better than before.

The big questions are: who will proliferate? Which entities and which types of entity stand to benefit the most? How might existing revenue streams be disrupted? How could those rewards come to be reallocated? Can there be an opportunity for all in a market that is, in theory, limitless? Can consumer IoT develop a business model that goes beyond just the sale of niche hardware? Is the “network effect”, i.e. the mash-up of cloud-based datasets, a viable business model?

M2M REVENUES BY LAYER

[Graph showing M2M revenues by layer from 2013 to 2019]

Source: Ovum
HOW WE HELP:

ASSESS THE OPPORTUNITY:

- FORECASTS FOR
  - M2M connections
  - M2M service revenues
  - M2M MNO revenues
  - M2M module vendor shipments
  - M2M module vendor revenues

TRACKERS FOR:

- M2M contract awards
- M2M platform deployments

TARGET THE MARKET:

- ANALYSIS OF
  - The IoT ecosystem
  - IoT business models
  - Regulatory developments
  - Network products

CASE STUDIES FOR

- Network equipment vendors
- Software platform vendors

COMPETE TO WIN BUSINESS:

- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists with detailed company information.

*available separately – see Data Tools p. 48-51

KEY THEMES FOR 2015:

1. OEM trends for the connected car
   Connected cars are one of the hottest “happening” markets in IoT. We provide case studies of leading car OEMs’ strategies for connected passenger vehicles. These cover mass-market manufacturers, higher-end manufacturers, and niche market innovators. We also provide cross-OEM trend analysis, best-practice summaries, and practical recommendations.

2. The evolving automotive opportunity
   We offer quantitative assessments of the passenger vehicle market for connected cars and the commercial market for fleet tracking.

3. Componentizing connectivity: what is the cost?
   We review game-changing developments in transforming connectivity into a plug-and-play proposition. Topics covered include embedded SIMs, over-the-air provisioning (OTAP), and the changing component “cost” of connectivity.

4. Enterprise versus consumer: which is greater?
   Does the greatest IoT value lay behind the scenes, away from the shop fronts, in the enterprise sector? Many service providers think so. Yet it is consumer IoT that steals the limelight. Can it present a viable mass-market, service-based proposition to go beyond the crowd-funded sale of enthusiast-only hardware? We provide case studies and cross-industry trend analysis of IoT device manufacturer and service provider business models.

5. Legislating for sufficient resources
   Our analysis pieces examine what legislation is necessary to secure sufficient IMSI number ranges, to streamline the switchover to IPV6, and to make sure there is enough bandwidth for the IoT.

6. M2M: the telco advantage
   At the core of the IoT lies managed, point-to-point connectivity serving the most individually valuable assets, be they end-points or points of concentration. Ovum’s ground-breaking M2M forecasts and datasets, featuring geographic, carrier, and service layer segmentation, will be continued and expanded. Scenario analysis will show the potential effect of landmark regulatory and technological developments.

NEW PRODUCTS 2015:

- M2M Contract Awards Tracker
- M2M Module vendor market share
- M2M module vendor profiles
- Connected car case studies
- Connected car trends
- Connected car datasets
- Embedded Cellular CE Tracker
- Embedded cellular CE trends
- Embedded SIM developments

- Global SIM developments
- M2M number range regulation
- M2M number range trends
- Machine-to-Machine Monitor – Track the activities of telcos and M2M providers
- The Smart Wearable Device Tracker report series – Tracking device launches, use cases, features, and prices
Infrastructure Solutions

Assess the latest trends in the rapidly changing infrastructure market. Discover how to improve software development, integration, service delivery, and system performance. Assess the impact of digital transformation, mobile, and cloud on architecture, processes, and applications. Understand how to mitigate against threats from the Internet and emerging technologies.

With regard to infrastructure software and application development tools, automation is becoming a vital component for the delivery of a proactive results-based service delivery model. Vendors must recognize that corporate IT is becoming a hybrid mix of different approaches and provide solutions that can operate as part of a heterogeneous IT environment. It is also important not to position cloud computing as a panacea. Cloud computing creates as many problems as it solves; vendors should go to market with a balanced message. The time for selling disconnected security products and hoping for the best has long gone; enterprises need integrated security solutions.

SECURITY TOPS THE LIST OF GLOBAL IT INVESTMENT PRIORITIES

Source: Ovum
KEY THEMES FOR 2015:

1. Improving cybersecurity with trusted identity and proactive protection
   News approaches and technologies are changing the way IT security and user protection need to be tackled. More proactive cybersecurity protection is required, with consumer/citizen identity a major challenge for commercial and non-profit organizations alike.

2. Architecting the hybrid IT platform of the future
   The combination of social, mobility, and cloud continues to drive changes in the way organizations operate. IT needs to modernize the existing platform and architect a software stack that can make the most of an as-a-service approach. The provision of APIs and data handling is becoming especially pertinent for digital transformation, mobility, and Internet of Things.

3. Applying intelligence and automation in the IT environment
   Many IT processes and procedures operate according to a people-centric model. The use of software-defined environments, real-time analytics, and automation technology can significantly improve the operation of the IT function in areas such as the data center, integration, downstream application development capabilities, and service delivery.

4. Advancing software quality in a connected world
   Software is becoming all-embracing, including applications for mobile, embedded, and networks. This brings to the fore issues such as performance and quality, as well as key IT capabilities such as testing, deployment, and management. Mobility is a concern for client-side application development.

5. Formulating an effective cloud computing strategy
   Organizations need to develop the right strategy in advance if cloud computing is to deliver the benefits it promises. Ovum survey data shows that many respondents still lack an overall cloud strategy even while acknowledging its importance.
Enterprise ICT Management

Understand enterprise priorities for managing the business of IT, from strategic planning and enterprise architecture through to performance benchmarking. Learn how enterprises are structuring their IT organizations in response to digital change, and how IT management and governance best practices are being applied to maximize the value of IT-enabled business investments.

Managing the business of IT is an increasingly complex task, and it is critical for all suppliers to fully understand the dynamics involved, if they are to be effectively serve enterprise clients. Product vendors must understand their customers’ technology roadmaps, and ensure that their solutions are a good fit for enterprise deployment, whilst for service providers and consultants there is an opportunity to play a direct role in aiding IT and business transformation, and become a trusted partner to the CIO and other business leaders. Ovum’s primary research and tools also provide direct insight into the priorities, pain points and opportunities within this cohort.

EXAMPLE ICT SPEND BY CHANNELS FOR A SPECIFIC COMPANY DEMOGRAPHIC

Source: Ovum
HOW WE HELP:

ASSESS THE OPPORTUNITY:
- Software market forecasts – A five-year view on growth in the Enterprise IT management market, segmented by vertical, region, and function, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in business technology for the year ahead.

TARGET THE MARKET:
- Enterprise ICT Spend & Staffing Metrics – A unique insight into estimated ICT expenditure and staffing levels for organizations in all sectors globally, which can be used to better understand key metrics and to help organizations benchmark against peers.
- ICT Enterprise Insights – Survey of over 6,500 ICT decision-makers, providing executive perspectives on business/IT drivers, investment priorities, selection criteria, sourcing and vendor preferences.
- Case studies – Recommendations, best practice, and advice on a wide range of IT management topics, showing how organizations have addressed their particular challenges.
- Frameworks and templates – Practical tools to help IT decision-makers and practitioners in their day-to-day work, to save time when working on a range of different projects.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists with detailed company information.
- ICT Spending Predictor* – Provides detailed ICT spending profiles to assist with list building, target identification and share-of-wallet assessment.

*available separately – see Data Tools p. 48-51

KEY THEMES FOR 2015:

1. Adapting IT processes to meet dynamic business demand
   If enterprises are to apply technology in a more strategic role, they will require IT processes that are capable of reacting quickly to business demand. This implies continuous rather than periodic approaches in areas such as service management, portfolio management, resource management and service provisioning. These will in turn require increased automation, better use of IT analytics, and the adoption of integrated approaches to IT performance management.

2. Reshaping IT capability to support digital transformation
   As organizations undertake digital transformation programs, the spotlight falls on the organization’s IT capability and on the role and structure of the existing IT function. Elements that occur frequently in this discussion include whether the IT function can be sufficiently responsive to digital initiatives, and whether digital initiatives should be executed separately from the normal flow of IT projects. This topic explores the options for reshaping the IT capability to meet the needs of the modern digital business.

3. Vendor and sourcing management in a hybrid environment
   It is clear that the future IT environment will be hybrid, utilizing in-house, shared service and third party providers, combining on-premise and cloud-based solutions, and bridging legacy, core and digital platforms. In this environment, an effective strategy for sourcing, service management and vendor management is essential, but with a number of different approaches to choose from, which will be the best fit for your organization? This topic explores the pros and cons of the available options.

NEW PRODUCTS 2015:
- Expanded market forecasts for enterprise IT management
- New series of ‘how to’ reports on IT management issues
- Enhanced version of Enterprise ICT Spend & Staffing Metrics
Retail Banking Technology

Use our expert industry analysis to make the right strategic decisions. Ovum’s Retail Banking Technology portfolio provides detailed and data-backed research into the development and adoption of technology, and the industry trends driving this change, across the global consumer banking and wealth management sectors.

The continued development of digital channels and the impact on both the core platform and related systems are front of mind for retail banks in 2015. The pressure to keep up with customer expectations, against a background of legacy systems, ageing branch IT and non-banks looking to enter the value chain, are all driving demand for both front- and back-office solutions. Data and security will be the key differentiators. Analytics will play a central role in creating both customer delight and enabling greater product sales, while banks must also continue to address fraud risk at minimal inconvenience to the customer.

GLOBAL IT PRIORITISATION PLANS FOR RETAIL BANKING IN 2015
KEY THEMES FOR 2015:

1. **Transforming the customer experience in retail banking**
   
   Despite many making steps in the right direction, a true omnichannel customer experience still proves elusive for retail banks. Indeed most struggle to deliver against current customer expectations, creating clear opportunities for improvement across sales, origination, marketing/communications, and servicing.

2. **Using analytics to unlock the value in retail bank data**
   
   As BI technology has developed, data analytics has become a key theme in retail banking. Product development, digital marketing, channel optimization, and cross-selling strategies can all be enhanced through better management and use of customer data.

3. **Driving growth from legacy modernisation in banking**
   
   The challenge of what to do with legacy infrastructure is more relevant now than ever. Once about cost savings, core renewal is now also about transforming the whole bank. The maturity of vendor solutions and growing pressure for change makes 2015 a key year.

4. **Securing the digital bank and preventing fraud**
   
   The rapid growth in digital channel use creates a number of security challenges. The need to authenticate customers with minimal inconvenience, against a backdrop of anytime, any place expectations, and a criminal fraternity growing more sophisticated in their abilities, creates a need for constant investment and renewal of fraud prevention software and policies.
Insurance Technology

Use our expert industry analysis to make the right strategic decisions. Ovum’s Insurance Technology portfolio provides detailed and data-backed research into the development and adoption of technology, and the industry trends driving this change, across the global life, property & casualty/general and commercial insurance sectors.

Global IT spend among insurers will see strong growth in 2015 and will be focussed on delivering a superior channel experience, as well as developing the insurance business model through areas such as emerging pay-as-you-drive propositions and the growth of insurance aggregators. The highest priority IT projects in 2015 will relate to customer channels and marketing systems. Insurance CIOs must meet an increasingly complex set of objectives to simultaneously deliver revenue growth, enhanced customer service, operational efficiency, and substantial operational cost reductions.

GLOBAL IT PRIORITISATION PLANS IN INSURANCE FOR 2015

Source: Ovum
KEY THEMES FOR 2015:

1. **Using analytics to unlock the value in insurer data**
   As understanding of BI technology has grown, data analytics has become a key theme in insurance. Product development, underwriting, digital marketing, claims fraud, channel optimization, and cross-selling strategies are increasingly driven by customer data. Telematics makes advanced data analytics even more important in shaping the future of the P&C insurance space.

2. **Driving growth from legacy modernisation in insurance**
   The challenge of what to do with legacy infrastructure is more relevant now than ever. Once about cost savings, core renewal is now also about transforming the wider business, and areas such as UBI will increasingly need modern, flexible architecture as a prerequisite.

3. **Strategies in usage-based insurance**
   The ability to accurately price motor insurance based on driver behavior is poised to revolutionize the industry. Telematics is the hottest area of the motor insurance space, as carriers assess when and how they should enter a rapidly changing technology space weighted against the risk of being left behind by their competitors.

HOW WE HELP:

**ASSESS THE OPPORTUNITY:**
- **ICT Spending Forecast** – A five-year view on growth in the insurance market, segmented by business function, technology source and geography, and updated annually.
- **Trends to Watch** – Signature reports highlighting the key predictions and trends in insurance technology for the year ahead.
- **Strategic Focus reports** – Signature reports highlighting the key predictions and trends in insurance technology for the year ahead.

**TARGET THE MARKET:**
- **Ovum Decision Matrix** – These reports provide a detailed and comprehensive benchmark of the key product and service vendors in a particular area of the insurance market.
- **ICT Enterprise Insights – Insurance** – An interactive tool for assessing ICT investment patterns in the insurance industry globally, with the ability to segment by geography, company type, and solution area.
- **Innovation case studies** – Recommendations, best practice, and advice based on the experiences of organizations using technology to solve business challenges.

**COMPETE TO WIN BUSINESS:**
- **ICT Sales Prospector** – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

NEW PRODUCTS 2015:
- Enhanced Technology Spending forecasts
- Insurance Software Contracts Tracker

*available separately – see Data Tools p. 48-51
Use our expert industry analysis to make the right strategic decisions. 2015 sees the launch of Ovum’s new Payments portfolio, which will provide detailed and data-backed research into the development and adoption of technology, and the industry trends driving this change, across the global payments industry.

The payments market is set to reach a critical inflection point in 2015 as banks finally make their moves in the digital wallet and proximity payment space. This will be a priority area for IT investment, and vendors should be ready with standalone platforms and services to integrate seamlessly into a bank’s existing channel mix. Alongside this, new payment areas, notably immediate payments, are emerging as the next wave of global payment innovation. Underpinning all of this innovation is a strong appetite for payments modernization, particularly for critical payment functions such as switching, clearing, and settlement.

**GLOBAL IT PRIORITIES IN PAYMENTS FOR 2015**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Share of respondents (%)</th>
</tr>
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<tbody>
<tr>
<td>Mobile/digital wallets</td>
<td></td>
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<tr>
<td>Mobile proximity payments (e.g. NFC, QR code)</td>
<td></td>
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<tr>
<td>Immediate retail credit transfers (e.g. Faster Payments)</td>
<td></td>
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<tr>
<td>mPOS</td>
<td></td>
</tr>
<tr>
<td>RTGS/wire</td>
<td></td>
</tr>
<tr>
<td>Contactless</td>
<td></td>
</tr>
<tr>
<td>Domestic person-to-person (P2P) services</td>
<td></td>
</tr>
<tr>
<td>Remittance/cross-border P2P</td>
<td></td>
</tr>
<tr>
<td>Credit/debit/prepaid cards</td>
<td></td>
</tr>
<tr>
<td>Bill payment</td>
<td></td>
</tr>
<tr>
<td>Mobile check capture/deposit</td>
<td></td>
</tr>
</tbody>
</table>

Source: Ovum
KEY THEMES FOR 2015:

1. Omnichannel commerce and the future of mobile payments
   Mobile payments are now mainstream in many areas of commerce, accounting for a growing share of online transactions. As HCE, BLE, and NFC all develop, the next stage of development will be strong growth in use at the point of sale. As the lines between physical and virtual commerce blur, this will drive real change in the wider retail payment experience.

2. Securing payments and preventing fraud
   The rapid growth in online and mobile commerce creates a number of security challenges. The need to authenticate customers with minimal inconvenience, against a backdrop of anytime, anyplace expectations, and a criminal fraternity growing more sophisticated in their abilities, creates a need for constant investment and renewal of fraud prevention software and policies.

3. Driving growth from legacy modernisation in payments
   This is a time of unprecedented innovation and regulatory change, and enterprises running legacy processing platforms are struggling to cope with today’s demands. The need to support a growing range of services, coupled with industry-wide initiatives such as immediate payments, and the impact of regulation such as PSD2, SEPA, and the Fed’s consultation paper, are leading to large-scale investments.

HOW WE HELP:

ASSESS THE OPPORTUNITY:
- ICT Spending Forecast – A five-year view on growth in the payments markets, segmented by technology source and geography, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in payments for the year ahead.
- Strategic Focus reports – Comprehensive and business-focused analysis of the critical issues impacting technology development and investment in the payments industry. Bringing together analysis from across Ovum’s Financial Services and Telecoms practice areas, themes include mobile proximity payments, digital wallets, real-time payments, data analytics, fraud, and legacy modernization.

TARGET THE MARKET:
- Ovum Decision Matrix – These reports provide a detailed and comprehensive benchmark of the key product and service vendors in a particular area of the payments market.
- ICT Enterprise Insights – Payments – An interactive tool for assessing ICT investment patterns in the payments globally with the ability to segment by geography, company type, and solution area.
- Innovation case studies – Recommendations, best practice, and advice based on the experiences of organizations using technology to solve business challenges.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

NEW PRODUCTS 2015:
- Consumer-centric mobile payment coverage from Ovum’s Telecoms practice
- Payments Software Contracts Tracker

*available separately – see Data Tools p. 48-51
Assess and understand how governments and agencies are moving from austerity to reform of services, by leveraging the increased availability of technologies. Learn what the implications are for IT platforms, systems, and business processes as agencies transform their service delivery capabilities to deliver service innovation and operational productivity improvements.

While austerity is still the name of the game, the sector continues to pursue the rebuilding work that is required if governments and agencies are to be in a position to deal with some of the more pressing issues they have to face over the next decade. Clearly digital and cloud hold great promise, but there remain significant barriers to the successful adoption and rollout across governments. The change from large, single-solution programs to multi-vendor, digital solutions will increasingly present smaller, more specialised opportunities for providers.
KEY THEMES FOR 2015:

1. Digital transformation of public sector
   Governments worldwide are looking to leverage online and mobile platforms to deliver services that both better meet citizen needs and are less costly to provide. In the past, the focus of “digital” has been largely limited to online services, but today’s reality is much more complex. Agencies must grapple with omnichannel processes, and fast-moving delivery and access technologies enabled by social computing, cloud services, analytics, and mobile devices and apps. Meanwhile, the boundaries of the public sector are shifting due to open data and co-production.

2. Cloud services in government
   Momentum for cloud services adoption is growing across the public sector worldwide, with a growing number of governments declaring cloud-first policies. The on-the-ground reality, however, is that adoption remains in low gear – constrained by the government readiness of solutions and conservative IT strategy and procurement mindsets and practices. If cloud-first policies are to be realized, then mindsets and practices need to change.

3. Identity management in government
   Providing effective identity management controls across government agencies is hard and getting harder; the growing requirement for mobile access, multiple device ownership, and remote working are just some of the issues. But government CIOs will struggle to implement these without a well-defined approach to managing citizen identity.

4. Developing standards for smart cities
   There are now rafts of standards for the individual components that cover the smart cities market. As cities move beyond point-to-point services, the ability to offer integrated systems will require the development of a systems approach. Cities are looking to developments in this area to ensure interoperability of solutions, to avoid vendor lock-in, to protect against supplier failure, to reduce overall costs, and to encourage the provision and reuse of open data.
Health Technology

Understand how healthcare transformation is shaping IT strategy and investment. Assess how healthcare organisations can maximise the benefits of technology innovation in areas ranging from analytics to IT infrastructure modernisation. Evaluate the challenges and opportunities for IT adoption in complex aspects of healthcare such as information sharing, data security, and patient relationship management.

Healthcare organizations will spend more money and time on health information management as they increasingly outsource IT infrastructure and services. Enterprises are aiming to increase the usage and sophistication of BI and analytical tools just as EHR usability and optimization come under the spotlight.

At the healthcare system level, investment and work on information sharing will continue apace, as will targeted funding and projects for expanding IT innovation in areas such as care coordination, preventative care, and patient relationship management. There will also be increased activity around the triple challenge of patient data – security, privacy, and consent management – in part due to more rigorous regulation and fines.

**TOP PRIORITIES FOR EHR/EPR SELECTION (GLOBAL)**

![Graph showing top priorities for EHR/EPR selection](source: ICT Enterprise Insights, N=327)
KEY THEMES FOR 2015:

1. Getting to grips with healthcare’s triple challenge: patient privacy, data security, and consent management
   The use of sensitive medical and social information within care delivery and medical research is growing fast. Organisations must tackle issues around patient data privacy and data security, which are critical to building public trust and meeting compliance; the consequences of failure are all too evident. Stakeholders need to carefully navigate the complex areas of information governance and consent management, while implementing technology and procedures to tackle data misuse and theft.

2. Building a viable roadmap for health information management
   Healthcare providers need to unlock the value of structured and unstructured healthcare data to transform care quality and efficiency. This requires effective planning to address all critical aspects including data quality, integration, management, and presentation. As organisations are targeted by more and more vendors seeking to position themselves as the key information ‘platform’, they must carefully evaluate their options and build a robust yet flexible roadmap, taking advantage of IT innovation in areas such as cloud computing and agile.

3. Beyond the pilot: strategies for mainstreaming technology-based healthcare innovation
   Technology-based innovation is blooming in healthcare, in areas ranging from remote patient monitoring to the use of gamification and social media for patient engagement. However, in many cases, the impact of such innovation remains limited as healthcare providers and vendors struggle to build viable funding mechanisms, business models, and adoption pathways to mainstream such innovation. Our research identifies the most critical areas of tech-based innovation in healthcare and explores strategies for scaling up and maximising the measurable impact of innovation.

HOW WE HELP:

ASSESS THE OPPORTUNITY:
- ICT Spending Forecast – A five-year view on growth in the healthcare market, segmented by technology source and geography, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in healthcare technology for the year ahead.
- Strategic Focus reports – Comprehensive and business-focused analysis of the critical issues impacting technology development and investment in the healthcare industry.

TARGET THE MARKET:
- Ovum Decision Matrix – These reports provide a detailed and comprehensive benchmark of the key product and service vendors in a particular area of the healthcare market.
- ICT Enterprise Insights – Healthcare – An interactive tool for assessing ICT investment patterns in the healthcare industry globally, with the ability to segment by geography, company type, and solution area.
- Innovation case studies – Recommendations, best practice, and advice based on the experiences of organizations using technology to solve business challenges.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

NEW PRODUCTS 2015:
- Healthcare software/services contracts tracker and analysis
- Enhanced technology spending forecast

*available separately – see Data Tools p. 48-51
Learn how the transformation of the education industry is driving institutions to re-assess how they support the student experience, provide exceptional academic services, and deliver more innovative programs. Understand how these changes influence ICT investment priorities and shape how institutions apply and configure these solutions to achieve business goals.

As the global economic crisis recedes, interest has grown exponentially in the education industry and driven an explosion in the number of ICT vendors targeting colleges and universities, from start-ups funded by venture capital and private equity firms through to established horizontal players launching new industry-specific solutions and organizations. Over the next three to five years, the competitive landscape, once considered entrenched and dominated by a small number of education-specific vendors, is likely to change dramatically by the success of new entrants and rapidly evolving institutional preferences for solutions and services.
KEY THEMES FOR 2015:

1. Putting the ICT pieces together to execute a student experience strategy
Higher education is experiencing a period of unprecedented change that will transform the industry: survival depends on differentiating and improving services. Leveraging a CRM solution will be a necessary but insufficient step towards achieving this goal. Institutions must look further afield and develop a coherent and integrated strategy, which will be difficult and require practical guidance on emerging best practice and identification of potential risks.

2. Next-generation IT strategy for colleges and universities
As institutions seek new efficiencies and capacity for innovation, the approach to the IT infrastructure and department will change. Better governance, on-demand deployments, more standardization, and increased vanilla implementations will rule the day. However, making this transformation will require thoughtful insight and guidance in order to be successful and sustainable.

3. Accessing professional services in the global higher education market
As the industry moves to make massive investments in enterprise solutions, the need for professional services has never been greater. However, institutions seek to avoid lengthy and expensive services engagements, and what constitutes ‘good service’ is changing. Furthermore, new geographic markets are expanding rapidly, putting pressure on application providers to identify high-quality services firms with local addresses and price points.

HOW WE HELP:

ASSESS THE OPPORTUNITY:
- ICT Spending Forecast – A five-year view on growth in the education market, segmented by technology source and geography, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in education for the year ahead.
- Strategic Focus reports – Comprehensive and business-focused analysis of the critical issues impacting technology development and investment in the education sector.

TARGET THE MARKET:
- Ovum Decision Matrix – These reports provide a detailed and comprehensive benchmark of the key product and service vendors in a particular area of the education market. Coverage includes learning management systems, constituent relationship management, and institutional performance management.
- ICT Enterprise Insights – Education – An interactive tool for assessing ICT investment patterns in the education sector globally, with the ability to segment by geography, institutional type, and solution area.
- Innovation case studies – Recommendations, best practice, and advice based on the experiences of organizations using technology to solve business challenges.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential, and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

NEW PRODUCTS 2015:
- Expanded market forecasts for education
- Maturity model for CRM adoption
- Competitive landscape assessment for LMS solutions

*available separately – see Data Tools p. 48-51
Telecoms Operations and IT

Understand the challenges facing telcos as they transform their IT systems, software, and business processes. Evaluate the competitive vendor landscape for telco software and services domains, and identify the role that software vendors and services partners can take in supporting that journey.

LTE, SDN, and cloud – and the characteristics of the services and applications they support – are driving telcos to transform their OSS and BSS estates. We forecast continuing growth in 2015 for network, revenue, and customer management solutions. Customer demand for greater service relevance and control over content, for example through mobile self-service applications, means there is great demand for analytics tools that monitor the quality of service and experience, identify customer value, and personalize outbound offers and care. The market is extremely competitive with large software vendors, niche specialists, systems integrators, and service companies converging on these opportunities.

BUSINESS DRIVERS FOR TELCO IT SPENDING 2014-15

- Transform IT platforms and systems (OSS and BSS)
- Invest in datacenter infrastructure to enable cloud service
- Introduce greater automation to internal processes
- Deliver end-to-end view of the customer lifecycle
- Improve customer self-service options
- Move towards shared services model
- Deliver unified view of the customer
- Meet contractual service-level agreements
- Virtualize network functions

Source: Ovum
KEY THEMES FOR 2015:

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

2. Exploiting telco information assets through Big Data and analytics
   Big Data analytics provides an opportunity for telcos to exploit an existing asset that is increasing in size exponentially. To date, market research has focused on the business case rather than the market opportunity and the evaluation of analytics tools. In 2015, we will cover both aspects, with a new market forecast on Big Data and a Decision Matrix on analytics tools for customer data.

3. IT service opportunities in the telecoms vertical
   The telecoms vertical has a specific set of requirements that cannot be served with “drag and drop” solutions from other industries. Ovum’s Telecoms Operations & IT practice evaluates the telco-specific factors in detail and the assesses the implications for the competitive vendor landscape.

4. Telco cloud and the impact on the CIO
   Telco need leaner, virtualized infrastructure to sustain their business and innovate new services. Our research assesses how changes in technology, such as SDN and NFV that enable private cloud, will shape the telco’s IT estate and the responsibilities of the CIO.

5. Intelligent network infrastructure to support the next-generation telco business
   Network infrastructure struggles to meet expectations for dynamic applications and services. SDN and NFV provide the dynamic and flexible architectures to enable this change. Our research evaluates the key vendors, their competitive strategies, and their technology offers.
Media & Broadcast

Understand how fundamental shifts in the way individuals consume media and entertainment, and in their expectations for a personalized experience, are driving the media & broadcast industry to transform how its services are delivered. Learn how this is influencing the ICT investment priorities of media and broadcast firms and how they are configuring their solutions to achieve key business goals.

As a strategy for contending with extreme disruption from new market entrants and rapidly evolving customer preferences, media and broadcast enterprises are investing heavily in technology to support a more personalized and targeted customer experience. These include advanced analytics capabilities to understand customer expectations and usage patterns, as well as more flexible and agile customer billing, media asset management, and service delivery systems to meet and support them. However, as the media & broadcast industry is highly fragmented and the requirements to support its industry-specific processes are far reaching, vendors seeking to target this market must invest in the development of deep industry expertise.

THE BIG DATA LIFECYCLE IN MEDIA & BROADCAST

Customer & Marketing Analytics

User Generated & market sentiment analytics

Content Personalisation

Formulation of New customer and revenue streams

Threat detection and quantification

Business Intelligence

BIG DATA VALUE FOR MEDIA ENTERPRISES

Source: Ovum

Topics:
- Analytics
- Big Data
- Billing systems
- Business intelligence
- Digital asset management
- Digital rights management (DRM)
- Information management
- Master data management
- Media asset management (MAM)
- Multi-screen video services
- Over the top (OTT) services
- Service management
- Social collaboration
- Traffic and scheduling systems
- Video on demand (VOD)
- Video transcoding systems
- Web content management
KEY THEMES FOR 2015:

1. Integration of linear and multiscreen video services strategies
   - Driven by changing consumer viewership patterns, from a single linear TV to multiple connected devices, media enterprises are investing in multiscreen video services to accelerate content monetization. Traditionally, they have serviced viewers on non-interactive linear channels, but with the emergence of non-linear TV content owners and distributors, they are investing in the modernization of legacy infrastructure to deliver better agility.

2. Media asset management (MAM) in publishing
   - Many media enterprises are becoming personalized data companies, requiring investment in digital asset management and distribution technologies, including MAM. As digital multichannel publishing tightly integrated with MAM is providing new revenue streams to reduce dependency on traditional segments, it is a high priority and dynamic area of the media industry.

3. Billing and CRM in broadcast media
   - As connected devices proliferate, managing the customer lifecycle becomes exponentially more difficult for media enterprises; delivering a seamless, connected living room experience with personalized content and advertising is their goal. However, achieving it requires the transformation of billing systems in order to reduce revenue leakage, as poor billing and CRM experiences are major contributors to high customer churn rates.

HOW WE HELP:

ASSESS THE OPPORTUNITY:
- ICT Spending Forecast – A five-year view on growth in the media & broadcast market, segmented by technology source and geography, and updated annually.
- Trends to Watch – Signature reports highlighting the key predictions and trends in media & broadcast for the year ahead.
- Strategic Focus reports – Comprehensive and business-focussed analysis of the critical issues impacting technology development and investment in the media & broadcast sector.

TARGET THE MARKET:
- ICT Enterprise Insights – Media & Broadcast – An interactive tool for assessing ICT investment patterns in the media & broadcast sector globally, with the ability to segment by geography, institutional type, and solution area.
- Innovation case studies – Recommendations, best practice, and advice based on the experiences of organizations using technology to solve business challenges.

COMPETE TO WIN BUSINESS:
- ICT Sales Prospector* – Helps vendor sales teams to assess industry revenue potential and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

*available separately – see Data Tools p. 48-51

NEW PRODUCTS 2015:
- Expanded market forecast for media & broadcast
- Interactive OVP tracker across 44 countries, updated biannually
- Clear linkages with Ovum’s market-leading Media business unit
Learn how innovation in fast-moving areas of information technology such as Big Data, analytics, IT/OT convergence, and mobility can help the upstream oil and gas industry address business and technical challenges posed by increasingly remote operations, complex geology, rising capital expenses, and larger capital projects.

Vendors selling into the upstream oil & gas industry must recognize that potential customers’ readiness for and receptiveness to IT vary greatly by location, size, and several other factors. It is therefore incumbent on vendors to tailor their offerings and value propositions to help customers fill the gaps in their IT landscapes and then exploit IT innovations to integrate operations, optimize business process performance, and build strategic advantage over their competitors.

**GLOBAL IT INVESTMENT PRIORITIES IN OIL & GAS FOR 2015**

Source: ICT Enterprise Insights, N=298

- Environment, health, and safety management
- Mapping, geospatial, seismic
- Workforce management
- Operations
- Planning and project analytics
- Asset management
- Production and well management
- Simulation and modeling
- Fleet/logistics management

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**Topics:**
- Asset management
- Big Data
- Business intelligence
- Capital spending management
- Contractual risk management
- Data visualization
- Document and records management
- Enterprise information management
- Enterprise applications
- Enterprise content management
- Enterprise performance management
- Field data acquisition
- Field operations analytics
- Geophysical data integration
- Master data management
- Oilfield Internet of Things
- Production analytics
- Well placement analytics

**WARREN WILSON**

PRACTICE LEADER

GLOBAL IT INVESTMENT PRIORITIES IN OIL & GAS FOR 2015
KEY THEMES FOR 2015:

1. Modernizing the IT platform in upstream oil & gas
   Exploration and production companies routinely tap space-age technologies to find and extract oil and gas, but many continue to use stone-age IT that causes information disconnects, delays, and bad decisions. Ovum’s upstream research explains how producers can exploit IT innovation to integrate operations and business information, streamline core processes, and improve the pace and quality of decision-making.

2. Exploiting data for new insights in upstream oil & gas
   Oil and gas producers have more data than ever about exploration, development, production, and market conditions, and more choice than ever about which vendors can best help them put all that data to use. This theme helps producers assess which tools and providers can deliver the most value, and helps solution providers tailor their offerings and messages for maximum market impact.

3. Business technology innovation in upstream oil & gas
   As upstream oil & gas operations become increasingly dependent on modern ICT systems, this theme looks at examples of innovation within the industry, including case studies that examine how oil & gas companies are using technology to solve business challenges. We also profile emerging technology vendors in the oil & gas market through our ‘On the Radar’ series of assessments.

HOW WE HELP:

ASSESS THE OPPORTUNITY:
- **ICT Spending Forecast** – A five-year view on growth in the upstream oil & gas market, segmented by technology source and geography, and updated annually.
- **Trends to Watch** – Signature reports highlighting the key predictions and trends in upstream oil & gas for the year ahead.
- **Strategic Focus reports** – Comprehensive and business-focussed analysis of the critical issues impacting technology development and investment in the upstream oil & gas industry.

TARGET THE MARKET:
- **Ovum Decision Matrix** – These reports provide a detailed and comprehensive benchmark of the key product and service vendors in a particular area of the upstream oil & gas market. Coverage includes professional services companies working in this sector.
- **ICT Enterprise Insights – Upstream Oil & Gas** – An interactive tool for assessing ICT investment patterns in the upstream oil & gas industry globally, with the ability to segment by geography, company type, and solution area.
- **Innovation case studies** – Recommendations, best practice, and advice based on the experiences of organizations using technology to solve business challenges.

COMPETE TO WIN BUSINESS:
- **ICT Sales Prospector** – Helps vendor sales teams to assess industry revenue potential and quickly create targeted lists of companies with detailed information from a database of over 850,000 organizations.

NEW PRODUCTS 2015:
- Enhanced Technology Spending forecasts
- Upstream Oil & Gas Software Contracts Tracker

*available separately – see Data Tools p. 48-51
Utilities Technology

Understand the key industry trends shaping the utilities industry and their impact on operating and business models. Understand the scale of new utility ICT investments, and the implications for IT platforms, systems, and business processes as utilities deploy smart meter and smart grid technologies.

The utilities industry’s current investment in ICT can be largely attributed to improvements in three interconnected areas: customer experience, business efficiency, and regulatory compliance. The industry is being forced by competitive and/or regulatory pressure to improve customer satisfaction, both in the way relationships are managed and in the quality of service. However, the industry make these investments in a climate of straitened budgets, so there is also a big focus on improving workforce efficiencies. While regulators have often adopted a light-touch approach, this is no longer the case; the burden of regulatory reporting is increasing and shows no sign of abating.

 TOP BUSINESS CHALLENGES IN UTILITIES FOR 2015

Source: ICT Enterprise Insights, N=256
KEY THEMES FOR 2015:

1. Utilities' security strategies
   This report will address utilities’ current strategies to cybersecurity in the post-Stuxnet world. Utilities’ approach to risk management is often fragmented, creating weaknesses in this area, so a new approach is needed to ensure network safety and reliability. This topic will provide enterprises with strong recommendations about how to protect critical national infrastructure from cyber-attack.

2. Billing opportunities in the utilities mid-market
   Most large utilities have already migrated to new billing systems; the next utilities to move are those in the mid-market currently supporting 20-30 year-old legacy systems. This report will evaluate different vendors’ offerings specifically for the utilities mid-market.

3. Data quality and data governance: best practices for utilities
   While it is hard to avoid the hype around the industry’s digital transformation, data quality and governance are often overlooked. Few utilities have yet realized how much time and resources they will spend on these topics, but they must prepare for transformational business process change or run the risk of severely limiting the opportunities that digital transformation offers. This report will look at best practices for utilities undergoing a digital transformation.
Data Tools

Ovum’s data tools are underpinned by our primary research and deliver robust market data to support your IT decision-making.

**DATA TOOLS COVERAGE:**

- IT spending metrics
- IT investment priorities
- IT spending forecasts
- IT sourcing contracts

**OUR APPROACH TO DELIVERY:**

- Analyst-driven IT & business context
- Broad and robust
- Accessible
- Applicable

**ICT ENTERPRISE INSIGHTS**

Understand and act on evolving ICT decision-maker attitudes to technology investment

Ovum’s ICT Enterprise Insights program is the largest annual survey of decision-maker attitudes to ICT investment available. For 2014 we have surveyed 6,500 senior IT executives across 62 countries in 72 lines of business, addressing 84 technology areas. The program provides executive perspectives across the full IT decision cycle, including:

- ICT budgets
- IT staffing
- business and IT drivers
- investment priorities
- selection criteria
- sourcing
- vendor preferences
- SaaS deployment

ICT Enterprise Insights enables vendors to quickly gain a deep understanding of enterprise ICT adoption and provides essential intelligence to support your decision-making from strategic planning through to client engagement.
ICT SALES PROSPECTOR

The ultimate tool to empower vendor sales teams

Designed to help ICT vendors accelerate their sales process, the ICT Sales Prospector helps sales teams assess which industries offer the greatest revenue potential, quickly create targeted lists of companies, and fully understand their prospects prior to making contact.

- 800,000 companies
- Over 700 industry sectors
- 275,000 companies with ICT spend data
- Over 22,000 IT services contracts

ICT SPENDING PREDICTOR

Account prioritization and share of wallet intelligence

Ovum’s ICT Spending Predictor provides detailed ICT spending profiles for 60,000 enterprises worldwide.

Whether you are running a sophisticated share-of-wallet assessment program or conducting basic account planning, Ovum has the most detailed, longest-running, most sophisticated program to deliver you the data you need.

- Quickly build lists of companies for ICT spend by industry and geography
- Lookup the estimated size and composition of ICT budget for a specific enterprise
- Model the expected spend of any company based on its demographic profile.

SOFTWARE AND IT SERVICES MARKET FORECASTS

Size the opportunity for key market segments

Ovum’s market forecasts enable you to analyse predicted changes in market size from 2013 to 2018 for multiple categories of software and IT services. Our methodology is based on extensive primary research and utilises Ovum’s long-standing expertise.

We provide the most robust forecasts available that also reflect the current segmentation of the IT market.

Compare year-on-year growth rates by:
- Region
- Country
- Industry segment.
Data Tools

OVUM INTERACTIVE DECISION MATRIX

Customise product comparisons to reflect an organization's specific requirements

The Ovum Decision Matrix compares the leading solutions in major enterprise and industry-specific technology categories and 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.

This powerful comparison tool enables you to:
- fine-tune the Ovum Decision Matrix
- perform what-if analysis
- create an audit trail.

IT SERVICES CONTRACTS ANALYTICS

The most comprehensive, up-to-date guide to outsourcing contracts

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.

- 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.

TELECOMS VENDOR CONTRACTS ANALYTICS

The most comprehensive source of information on telecoms equipment contracts available

Ovum’s Telecom Vendor Contracts Analytics data tool is the most comprehensive source of information on telecoms equipment contracts available. With more than 12,600 publicly announced vendor contracts dating back to 2004, covering 34 market segments, it provides unrivalled insight into the deployments by industry, geography or customer.

- Identify contracts for specific vendors or customers
- Track major capex and opex contracts
- Track a vendor’s market traction in specific geographies
**WORLD CELLULAR INFORMATION SERVICE**

*A benchmark source of cellular market data and forecasts*

First launched in 1995, World Cellular Information Service (WCIS) has become the cellular world’s definitive source of accurate, robust market data and five-year forecasts.

The service combines live, intelligently sourced data from leading mobile industry players with an advanced online interface. The tool enables telecoms players to size and segment their markets, identify trends, understand market behavior, and act on competitive threats.

**WCIS tracks:**
- historical and forecast subscriptions for 227 countries
- key operational and financial performance indicators for 480 operators
- network information for 1,202 networks
- operator ownership and group investments for 480 operators
- mobile data usage and take-up including data subscribers, deployments, revenues, mobile broadband usage, and SMS/MMS traffic.

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**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.

**WBIS tracks:**
- historical and forecast broadband subscriptions for 200+ countries
- multichannel TV for 480+ countries
- fixed-line access for 150+ countries
- fixed voice for 180+ countries
- financials for 950+ operators.
The Knowledge Center is Ovum’s powerful online portal enabling you to access and share our insight, and engage with our analysts, quickly and easily from wherever you happen to be.

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
- Ask an Analyst – put your questions to our analysts
- Visualization of market data and forecasts
- Simple navigation, powerful search
- Create customized weekly and monthly research alerts
- Curated newsletters featuring our latest must-read research
- Open file formats – our research is easy to incorporate into your presentations and documents

KNOWLEDGE CENTER 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.

**Business Trends Survey**
Comprehensive surveys examining how the business issues across a variety of industry sectors are influencing organizations’ investment in IT solutions and services.

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

**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.

**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.

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

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

**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.
Talk directly to our analysts

Analyst Support is a central feature of each of our subscription services. This gives you direct contact via telephone, email, or face to face, with analysts who are specialised in the subject area in question. This is invaluable when you need clarification, expert opinion or market context to support your decision making.

In order to ensure the value of the service we have engineered our response procedure to be fast, flexible and effective.

Analyst access can be used to:
- gain further insights into our existing findings
- add to the context behind market developments
- further explore our methodologies.

As Analyst Support is an integral part of our service, we encourage you to consider our analysts as an extension to your own team.

“Thanks for the call earlier today, it was extremely useful. The insights you shared helped to assure us we are on the right track in terms of developing our business in this area.”

“Thanks a lot for your efforts. The information that you sent to me was very useful. I really appreciate the professionalism and speed of the Ovum team.”
Ovum Consulting for ICT Vendors

ICT vendors need experienced subject matter experts armed with rich data assets to support a range of business initiatives and answer specific questions using rigorous, proven methodologies.

Ovum’s consulting methodology enables us to take a modular, systematic approach to bespoke engagements, helping us deliver projects faster, more cost effectively and of a higher quality than our peers.

We delivered over 2,000 individual projects in 2013 ranging from complex strategy definition, vendor selection and due diligence projects, to the fast, efficient creation of infographics and video. Only Ovum is able to combine the expertise of our analysts, our extensive data assets, and proven consulting methodologies and experience, to create solutions that consistently meet and exceed client goals.

Ovum offers a complete range of services. In collaboration with Ovum’s consulting team, you can choose the solution best suited to the needs of your project. These include bespoke technology analysis, strategy formulation using a classic strategic consulting toolkit, vendor selection using existing data and tools, architecture reviews, workshops, and cost benchmarking.
CASE STUDY 01:

CLIENT: GLOBAL SOFTWARE VENDOR
PROJECT: ACCOUNT LEVEL ICT SPENDING AND COMPETITIVE INTELLIGENCE

CLIENT OBJECTIVE

• Understand total ICT spending by technology area for existing and target account base in Asia-Pacific
• Identify the competitive installed base by technology for each account.

OVUM SOLUTION

• Detailed ICT spend data for 18 country markets by technology type
• Granular insight into competitive installed base mapped to the vendor’s own taxonomy.

CASE STUDY 02:

CLIENT: TIER-1 SERVICE PROVIDER
PROJECT: ACCOUNT LEVEL OPPORTUNITY ANALYSIS

CLIENT OBJECTIVE

• Identify opportunities in the UK market that would yield £500 million of new revenues
• Prioritize accounts to target from an existing long list.

OVUM SOLUTION

• Opportunity size for each enterprise on the long list, including contract renewal data and overview of ICT spend
• A priority shortlist of 20 accounts scored on propensity to buy and alignment to vendor’s core solutions.

CASE STUDY 03:

CLIENT: GLOBAL BANKING SOFTWARE SOLUTIONS PROVIDER
PROJECT: NEW MARKET THOUGHT LEADERSHIP AND LEAD GENERATION

CLIENT OBJECTIVE

• Translate domestic market success to a new geography through a series of marketing initiatives.
• Adopt tailored messaging addressing local constraints and pain points to drive sales in the region.

OVUM SOLUTION

• Primary research for a whitepaper and webinar that enabled the client to proactively promote the solution and its brand in the region.
• A quantitative and qualitative demonstration and validation of the business requirement for the client’s solution.

CASE STUDY 04:

CLIENT: GLOBAL FINANCIAL SERVICES SOLUTIONS PROVIDER
PROJECT: CUSTOM MARKET SIZING

CLIENT OBJECTIVE

• Understand the market size and opportunity potential for main market segments.
• Understand how the market was shifting between software license, services, and SaaS.

OVUM SOLUTION

• A granular, interactive market sizing and forecast opportunity model.
• Detailed analysis that adapted standard market segment definitions to align with the client’s market segments.
Our Analysts

We have analysts in 23 global research offices across 5 continents. They are experienced, objective and ready to apply practical ‘real world’ expertise to your business challenges and opportunities.

SOFTWARE

The Ovum Software global research team analyzes the important role of IT in enabling business improvement, change, and innovation. Based on these insights, we help organizations to define an appropriate IT strategy and define an infrastructure and functional capabilities to sustain this strategy in a cost-efficient, secure, and compliant manner. Our research includes extensive analysis of key enterprise technology areas, as well as emerging technologies. Considering the full technology and business architecture, we identify and analyze business and industry issues, and provide IT deployment advice and vendor and market analysis. Ovum Software offers detailed assessments of leading IT solutions, which includes the Ovum Decision Matrix summarizing the technology assessment, execution capability, and market impact for each product reviewed in depth. We also understand the common business pressures and disruptive technologies that sit foremost on CIO agendas, enabling us to advise organizations of their impact and how they should react to them.

IT SERVICES

Ovum’s coverage of the services market takes into account the trends across all aspects of IT, outsourcing, and BPO, including consulting and systems integration, infrastructure and applications, front- and back-office functions, and delivery models such as hosting and cloud.
INDUSTRIES TECHNOLOGY

Ovum is deeply committed to the idea that industry context matters when making effective ICT investments. The combination of external factors, such as economic trends, demographic realities, political shifts, as well as business and consumer innovation, with the internal strategic and tactical requirements of delivering a specific industries’ products or services shapes its requirements and preferences for technology. Consequently by leveraging our significant industry and horizontal technology expertise in a collaborative way, and supported by extensive primary research, we are able to deliver unparalleled insight into solution and service requirements, end-user preferences, investment trends, and the competitive landscape on an industry-by-industry basis.

DATA & TOOLS

Ovum’s Data Tools, which are underpinned by Ovum’s primary research, deliver critical intelligence to your strategic planning, product marketing, and sales activities. We provide:

- Market data that is timely, granular, and reliable, as a result of our longstanding and deep connection with the industry
- Consistent outputs that you can trust, delivered by a robust analysis and five-year forecasting process
- Powerful, customisable, and easy to use interfaces and deliverables that save you time and effort
- Direct, on-demand access to senior analysts to clarify metrics and methodologies, add immediacy to findings, and place them into context for your business

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Ovum Events

A series of leading Enterprise Technology events, organised by Informa, and powered by Ovum has been designed to keep CIOs and senior IT management appraised of the latest developments in technology. Through a mix of conferences, dinner debates, webinars, and our annual Ovum Industry Congress, we bring leading IT and telecoms suppliers and solution providers together with senior-level decision-makers from end-user organizations.

Each of our events provides:
- Expert opinion
- Practical advice
- Industry insight
- Interactive discussions
- Networking opportunities
- Complimentary attendance for Ovum subscribers

2015 EVENTS SCHEDULE

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<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Location</th>
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<tbody>
<tr>
<td>Ovum Industry Congress</td>
<td>12-13 May 2015</td>
<td>London</td>
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<tr>
<td>Smart to Future Cities</td>
<td>28-29 April 2015</td>
<td>London</td>
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<tr>
<td>Future EdTech</td>
<td>2-3 June 2015</td>
<td>London</td>
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<tr>
<td>Ovum European Strategy Briefing</td>
<td>October 2015</td>
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<td>Future of Work Summit</td>
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<tr>
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<td>December 2015</td>
<td>London</td>
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Ovum runs a series of Public Sector events across cities in Australia and New Zealand:

Ovum Public Sector Series

- May and October
  - Perth, Australia
  - Adelaide, Australia
  - Melbourne, Australia
  - Canberra, Australia
  - Sydney, Australia
  - Brisbane, Australia
  - Wellington, New Zealand
Explore 9 ICT budget metrics for 16 industries

Access Ovum’s interactive infographic and explore 9 core IT budget metrics available as part of our 2014/15 ICT Enterprise Insights program – the largest annual survey of decision-maker attitudes to ICT investment.

Filter each metric by industry and region:
- IT spend as % of revenue
- Top level IT spend splits
- Shadow IT as % IT budget
- IT budget growth
- Channel spend allocation
- Channel spending growth
- Run the business / Change the business ratio
- IT FTE per 000 users
- Security spend

Visit: ict-insights-infographic.ovum.com
Whether you need insight to support strategic planning, product development, or your go-to-market strategy, Ovum provides solutions that will save you time, reduce risk, and help increase your revenues.

Ovum helps ICT vendors:

01 Assess the opportunity
02 Target the market
03 Compete to win business

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ovum.com

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