

# RESEARCH AGENDA 2019

ENTERPRISE DECISION MAKER

# Enterprise Decision Maker



**Tim Jennings**

Chief Research Officer

*Enterprise Services*

“

Enterprises face the twin challenge of transitioning both the IT function and the technology environment to an as-a-service model, while meeting the business imperative for innovation, digitalization and technology-enabled transformation.

”



# Advanced Digital Services

## The Market Challenge

Making use of automation and AI, taking advantage of emerging IoT opportunities and continuing workload transformation and migration are top priorities for large enterprise. IT departments are reorganizing around business imperatives with broader business-wide stakeholder involvement, while digital transformation is fundamentally changing the status quo.

Service providers' challenge is to satisfy the advanced requirements of the digital enterprise. Security is increasingly complex and requires constant vigilance, while successful application modernization requires deeper, more comprehensive approaches than a simple lift and shift.

Meanwhile, automation and AI have potential to change the nature of managed services in networks, across business processes and in IT departments. How can service providers position themselves effectively in this changing landscape?



## How Ovum helps you

**Understand** market evolution and how to deliver and manage advanced services to support enterprises' evolution into mature digitally-enabled businesses.

**Target** the end-to-end proposition through a comprehensive view, and avoid treating applications transformation and migration, IoT integration, automation and AI as if they are silos.

**Determine** must-have security offers to help protect enterprises from security threats as growing digital connectedness makes multinational enterprises an appealing target for cybercriminals.

**Learn** from profiles of successful service strategies and implementation stories providing insights into best practice scenarios around leveraging service management as a critical capability.

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**Miriam Deasy**  
Principal Analyst

“More than 54% of IT decision makers at large enterprises consider creating digital capability among their top three priorities.”

## Key Deliverables



**Ovum Decision Matrix:** a comparative evaluation that helps enterprises select a provider partner for services.



**Trends To Watch:** Application Services, Automation / AI



**IT / Telco services contracts analytics:** Global tracker that covers publicly announced contracts signed by major service providers updated weekly.



**Enterprise CIO surveys:** covering services priorities for large enterprises and MNCs, in multiple geographies and industries.



**Service provider strategy updates:** analysis of new digital services and business services models from top providers, with a particular focus on strategies in applications services and managing customer experience for multinationals.

## Themes for 2019

### Application and services modernization

Business application modernization and agile process transformation go hand in hand when it comes to building the adaptive enterprise. We examine how systems integrators and other service providers are changing the way they deliver and manage application services and systems integration portfolios, including services around Oracle, SAP and Salesforce. At the same time, we evaluate the features of these software vendors' own platform-based offers and assess whether they are competitive with service providers and SIs, or will require new forms of partnership.

### Automation and AI technologies: providers driving business outcomes

We examine how service providers are putting automation and AI to use where it matters. Their tools may be a mix of RDA, RPA, AI and cognitive techniques, chatbots and intelligent assistants, but what they use is less important than the use cases and proof points demonstrating improved business outcomes. We track the issues and challenges in deployment and adoption and evaluate service providers' capabilities, process-specific and industry-specific approaches.

### Targeting the large enterprise opportunity

The shape of the large enterprise deal is changing. Focus and specialization are even more critical in a generic cloud service future. We provide the most comprehensive picture of the changing shape of the deal in enterprise managed services, in region and globally, with an increased focus on transformational applications services and cloud-based service delivery. Our contracts research provides insight into the market as a whole by provider, industry and service type, and our forecasts cover the total addressable market for the full range of ICT services, from connectivity to applications.

### Successful service management

Service provider success depends on placing the relevant people at the heart of decisions about business process and new product/service development. The focus should be on improving the experience or journey: customer journey, employee journey and partner journey. In this stream we examine how service providers are building out infrastructure and services to support journeys throughout their digital transformation.

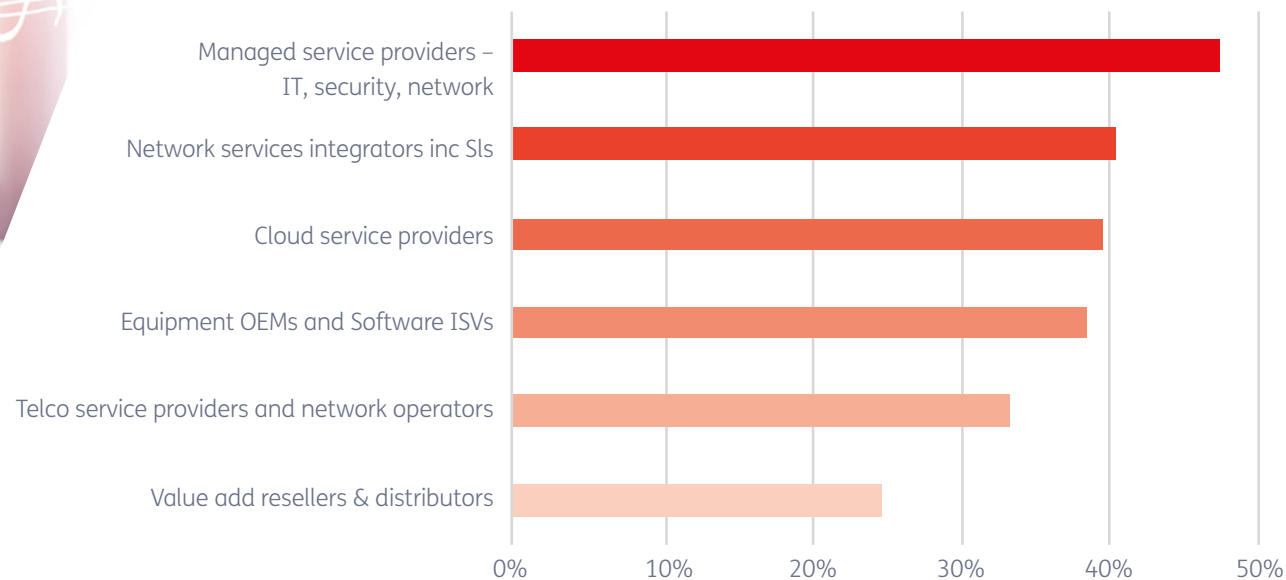
## What's new

**AI services out of Asia-Pac** – Ovum Decision matrix examines the overall market impact of new AI services.

**Total Addressable Market Forecast (TAM)** - Total addressable market for: Enterprise IT services, cloud services, telecom-managed services and managed security services forecasts by service type, geographic region and industry vertical.

**SI strategies in IoT integration services** – most SIs are betting big on IoT as they recalibrate their strategies. How will partner ecosystems change and what can vendors do to adapt?

## Managed service providers get user vote of confidence



A managed service provider, with an end-to-end capability in networking, IT, applications software management, and service desk, is the user favorite to deliver agile IT services, as this chart from a European regional survey (100+ large enterprises in Germany, Austria, Switzerland) shows.

*How confident are you, in the ability of the following service providers to deliver next gen network services? ('Completely confident')*



# Customer Engagement

## The Market Challenge

Digital transformation is a journey with no end point, and enterprises are in a state of continuous evolution. Successful competition in this environment is defined by the capability of the enterprise and its ecosystem of partners to sense and anticipate change, adapting at speed to serve current and emerging markets. To meet this challenge, enterprises must create experiences that match customers' constantly changing expectations. Building an integrated and adaptive organization demands enterprises focus on three areas: developing a unified digital platform that spans operational and customer-facing activities, organizing around the customer, and curating adaptive, customer-focused business models.



## How Ovum helps you

Enterprise senior leaders must take ownership of customer engagement, building a culture of customer empathy and harnessing emerging transformative technologies that will positively define the customer experience. The vendor community must work lockstep with enterprises to conduct these activities:

**Align business** practices to customers' operating principles

**Deliver emerging** technologies that are converging to enrich the customer experience beyond satisfaction

**Introduce new** business models that allow real-time adaptation to customers' evolving needs and expectations

**Identify the critical attributes** that effectively enable enterprise-wide continuous digital transformation

**Share best-in-class** examples for maintaining relevant and responsive customer ecosystems

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**Tom Pringle**  
Head of Technology Research



Creating digital capability' is the top priority of organizations, yet 'increasing revenue and budget' is their top challenge



## Key Deliverables



**Ovum Decision Matrix assessments:** how enterprises are adapting at pace to deliver end-to-end digital customer engagement supported by customer interaction analytics, processes, and accountability.



**Market Radars:** the convergence of AR, VR, and AI. Analysis of how emerging technologies will work together to further enhance the connected customer experience.



**Analyst Insight:** how transformative operating models and digital technology are helping B2B create B2C-like customer experiences.

## Themes for 2019

### Digital and physical reality converge for advanced customer experience delivery

Integrated digital customer experience is the new business mandate. As digital technologies connect physical objects with data and intelligence, and the physical spaces associated with customers' digital journeys, the lines between these will blur. The "digital first" approach will shift to "data first." From sending location-aware, tailored messaging to customers, to enhancing their brick and mortar experiences, to using augmented reality to influence purchases or enhance service, this convergence of digital and physical will dramatically change how enterprises engage with customers. This new customer engagement dimension will see IoT, wearables, AR, VR, and the data that connects them, meet, powered by a unified platform that will be the foundation of a more converged customer experience.

### Digital transformation will give way to continuous transformation

Digital transformation is a journey with no end. Enterprises must make continuous digital transformation their new objective. This requires the entire enterprise value chain be integrated, connected by real-time information. The front office, back office, and external networks should all work seamlessly toward a common goal – serving the end-to-end customer experience. Enterprises, supported by their vendors and service providers, must cultivate a culture of continuous change, underpinned by an adaptive enterprise architecture which encompasses Agile and DevOps as the methods of choice. Building a standards-based digital platform that enables a consistent and predictive experience which anticipates customers' needs will be the priority.

### New technologies allows B2Bs to embrace direct-to-consumer relationships

Traditional B2B enterprises have been granted new opportunities to connect with their ultimate customers, powered by technology that connects them far closer than ever before. From the merging of virtual and physical identities; network-connected devices generating new streams of data; social platforms for collaboration; and the infusion of AI to transform enormous amounts of information into decisions and future business models – the barrier between B2B and C has eroded. Empowered by these technologies, B2B enterprises will morph into B2C-like businesses. Real-time adaptation to changes that reflect the market and customers' evolving needs will be possible, challenging operating models.

## What's new

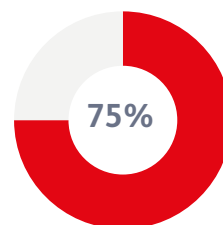
**CIO analysis** – interviews with CIOs, CMOs, CXOs to create an understanding of how emerging technologies like the AR cloud, IOT, and blockchain will effectively augment information and enable multi-user engagement and collaboration.

**“How-To” guide** – an examination of the necessary framework for enabling digital workplace transformation at scale and the emerging technologies and platforms that forge a single digital workstream.

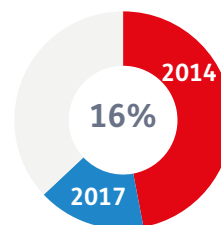
**Practical thought leadership:** A review of how new business models like gig work, peer-to-peer communities, and crowd-sourcing shape B2B customer engagement.

## Consumers Demand Digital

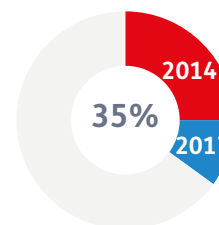
CUSTOMERS THAT ARE  
ALREADY ON THE WEB  
WHEN ENGAGING



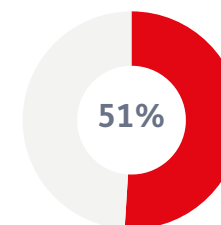
EXPECTED INCREASE IN  
SELF-SERVICE IN 2017



NUMBER OF  
CUSTOMERS THAT  
USE MORE THAN 4  
CHANNELS



STILL, CUSTOMERS  
PREFER VOICE  
FOR MORE COMPLEX  
ISSUES



Customers are multi-modal in nature

The voice channel is becoming a secondary entry point and focuses on more complex queries

Self-service is not about deflecting, but about attracting



# Data & Enterprise Intelligence

## The Market Challenge

Artificial intelligence has been hyped before; however, the convergence of cloud processing power and economics of modern storage set the stage for transformative enterprise potential. But with this immense potential comes proportionally formidable challenges. Data silos still pose a perennial blockade to comprehensive leverage of big data, but architectural barriers today only tell a portion of the information management story. For the enterprise to operationalize these AI initiatives beyond localized projects and drive true digital transformation while avoiding risk, a vast coordination of people, processes, and technology is required. Governance not only for data itself, but for complex systems and business culture, is required.



## How Ovum helps you

**Understand** how governance of process, not only data, is necessary for digital transformation in an era of constant disruption

**Learn** best practices for ensuring ethical and accountable implementation of AI to drive optimal business outcomes

**Evaluate** enterprise-wide frameworks for data analysis which efficiently leverage people, process, and technology

**Explore** the capabilities of modern cloud infrastructure to remove the physical and economic barriers of data access and leverage

**Organize** the resources and technology to enable a self-service culture that extends to AI, not just visualization

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**Tom Pringle**  
Head of Technology Research

“The total cloud BI and analytics software market is forecast to grow with a CAGR of 34.6% from 2017-2022.”

# Key Deliverables



**AI governance and transparency for business value** – best practices and hands-on advice for sustainable, repeatable, ethical model development and application



**Orchestration of human process and operationalization of AI models** – frameworks and blueprints for enterprise-wide, end-to-end management of the human and technical aspects of the AI workflow



**Cloud compute and storage for the leverage of all data** – market landscapes and vendor assessments of key cloud data and analytics solutions to navigate growing volumes and varieties of data

# Themes for 2019

## Operationalized AI is defined by governance and transparency

To date, most enterprise AI efforts have been localized on machine learning or deep learning projects. But for organizations to operationalize and scale these initiatives enterprise-wide, robust data and model governance will be critical. As systems become self-taught, they become opaquer: violating regulatory compliance, jeopardizing result reproducibility, confounding ROI calculation, and raising ethical concerns. Governance is needed on two fronts: to govern the data consumed by models, and to manage the model development process itself. To play a transformative role in business outcomes, transparency and accountability for AI processes is key.

## Data and AI will force enterprises to be data-driven

There is a wealth of data available to enterprises: much of it underutilized due to siloed architecture, time constraints, and complexity of analysis. The accessibility of new external and internal data resources will enable companies to consume, analyse, and efficiently act upon vast, rapidly-moving data at speeds not possible before. Success with AI requires more than mastery of algorithms and frameworks; it requires the effective management of people and process so that knowledge is shared. AI must be aligned with business objectives, be adequately documented, and be rigorously tested to ensure the fidelity of models and achievement of goals.

## The cloud removes the barriers to using ALL of the data

The economics of cloud storage and compute remove nearly all the barriers for optimal enterprise leverage of all available data. Cloud economics reduce the cost of storage, and cloud compute allows enterprises to pay only for what they use. Data today is defined by increasing complexity; much of the data available comes from sources outside the enterprise, and the business increasingly utilizes data outside of traditional – usually transaction – systems. Data-driven enterprises remove not only the physical and economical barriers to data utilization but change mindsets; the business culture must pivot to encouraging discovery and rigorous experimentation.



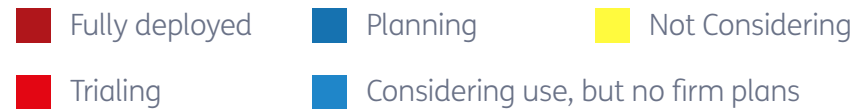
## What's new

**Explore real-world stats in data governance** – New Forecaster “Information Management” drill-down will allow insight into enterprise governance trends and investments.

**Tackle the challenges of AI operationalization** – new topic packs of research will be designed to address the functional process and technical barriers to enterprise-wide AI implementation.

**Understand enterprise leverage of cloud infrastructure** – an expanded ICT Enterprise Insights survey will gather intelligence on cloud use as it relates to the implementation of AI and machine learning.

## Artificial Intelligence

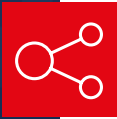




# Education

## The Market Challenge

The higher education sector has reached a point of profound change. This change is being driven as much by increased competition, changing demographics, new patterns of employment and the changing needs of employers as much as it is by the innovative use of technology to deliver education services. These forces for change present new opportunities for institutions that can construct better, more engaging, and more compelling learning experiences for students. The ability of technology to marry administrative, classroom and – increasingly – consumer technology is critical to improving the flow of information which is required to inform and support the delivery of superior learning experiences.



## How Ovum helps you

**Learn why** institutions are focusing on improving institutional agility, flexibility, and capacity for innovation, and what this means for ICT investment priorities for 2019

**Gain insight** into the best ways to combine systems that contain student information with management and communication tools to create better student experiences

**Stay ahead** of the competition, by understanding how to effectively position technology offerings to the business needs of educational institutions

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**Richard Palmer**  
Principal Analyst

“Global spending on education IT will reach \$34bn by 2021”

## Key Deliverables



**ICT Enterprise Insights** – Global survey of educational institution pain points and IT buying intentions for 2019-20



**Ovum Decision Matrix** – Analysis of the leading vendors solutions in key areas, including student success solutions and online learning platforms

## Themes for 2019

### Connecting the campus through data analytics

While analytics for teaching and learning or analytics used for institutional research purposes have undeniable benefits in their respective realms, creating a cohesive analytics ecosystem can drive insights across the campus and build better outcomes for all constituents. Accruing data from sources across the campus – connecting devices, systems, and data sources – can improve operational efficiency for the institution. In addition, it can enhance the overall constituent experience by personalizing the student journey and improving staff workflows.

### Personalizing the education experience

Whether on-campus or online, the modern student demands a modern and personalized learning experience. Learning tools and applications need to match the sophistication of their consumer experiences, from video platforms used to deliver accessible and engaging content to augmented reality and virtual reality (AR/VR) applications that can provide a more hands-on, immediate experience. A university's learning management system (LMS) should not be used merely as a content repository but be utilized as a next-generation digital learning environment (NGDLE) that provides greater opportunities for collaboration and personalization.

### The Education Ecosystem

A new generation of Student Management and education ERP systems has emerged in recent years. Enhanced analytics capability, process automation tools and AI capabilities feature broadly across these offerings. We will follow early adopters as they gain value from these new capabilities; chart the progress of university technology and information architecture; as well as examining how these contribute to a re-conceptualized education ecosystem for a flipped and blended world.

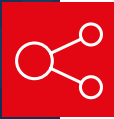
### Aligning the IT organization to education and research

Digital maturity, cloud services and supporting a constant flow of business change are themes for higher education as much as any other industry. Delivering education and undertaking research, however, have unique characteristics not shared by manufacturing, telecommunications, financial or retail services. We will chart the progress of digital maturity in education, and offer insight into how IT organizations can better align leadership styles, skill sets, structure, culture, processes and governance with the emerging needs of a mid-21st century university.

# Enterprise ICT management

## The Market Challenge

Ovum continues to witness the evolution of the CIO's role in terms of delivering IT services at a faster and more flexible pace for business outcomes. Digital transformation is unlike prior technology trends because the need to address it comes from an ongoing evolution in how consumers/clients/citizens engage holistically with organizations. This continues to exert pressure on organizations to adapt and react more quickly to this external shift in business engagement across industries and countries. To be successful in providing digital services IT functions have to address both how they operate internally and how IT services are delivered in support of their organizations digital agenda.



## How Ovum helps you

**Understand** peer-group priorities for, and approaches to, delivering digital services to business functions.

**Discover** new approaches to managing the business of IT, from strategic planning and enterprise architecture through to IT budgeting and finance.

**Learn** how other enterprises are structuring their IT organizations in response to their digital journey.

**Discover** how IT management best practices are being applied to maximize the value of IT-enabled business investments.

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**Tim Jennings**  
Chief Research Officer



With an average maturity score for digital strategy of 34% there is clearly significant work still to be done





# Key Deliverables



**Trends to Watch** – reports for major industry and technology domains.



**Enterprise Case Studies** – explain how peers have used technology to solve business challenges.



**ICT Enterprise Insights** – shows key trends based on over 6,000 interviews.



**Ovum Decision Matrices** – provide comparative evaluation of the leading enterprise solutions and services.



**On the Radar** – reports highlight new solutions and providers of emerging technologies.



**How-to-Guides and Maturity Models** – help you to understand best practices for technology deployment and management.

## Themes for 2019

### Evolving the Digital IT Organization

The role of IT organizations is in flux as they seek to meet the challenges of an era of digital disruption, which demands continuous, rapidly delivered cycles of business transformation. More collaborative, agile modes of funding and delivering business change are mainstreaming, and IT organizations are being challenged to become business partners in both strategy development and execution. Those that do not rise to these challenges risk being left behind.

### Managing in a Multicloud World

Enterprise IT functions are challenged in today's multicloud environment by factors including the proliferation of cloud service providers, the difficulty in predicting and managing the cost of cloud usage, a lack of portability of cloud workloads between environments, and commercial terms that reduce the flexibility of cloud service usage. A business-driven cloud migration strategy must marry the transformation of internal IT delivery with the business benefits of external cloud service adoption.

### Adopting Disruptive Technologies

As technologies evolve, the skills required by both the business user and the IT department are also changing. The impact of technologies such as AI/ML, quantum computing, and robotics will change the way organizations operate, the processes they employ, and the alliances they form. Identifying which partners and technologies to adopt and when, is key to making any such transition a success. The wider impact of these new technologies is the change to the socio-economic environment, challenging organizations to remain relevant.



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## What's new

**New tools** to support IT budgeting.

**Updated enterprise** IT spend benchmark.

**New case studies** to highlight best practice in enterprise IT.

# Government

## The Market Challenge

While the government sector has traditionally been considered a conservative sector, world governments will come under increasing pressure in 2019 to transform and modernize. As the pressure for digital transformation continues to gather pace, traditional thinking about IT as an internal provider of services to the business will no longer be sufficient. Successful CIOs will need to consider a much broader policy and people context. Governance and internal cultural change will become increasingly challenging as the IT function scrambles to meet growing citizen expectations. Cloud, analytics and cyber security will play an important role as governments strive to be seen as more responsive and trustworthy. Cognitive computing will continue to grow in importance for driving both efficiency and effectiveness in government.



## How Ovum helps you

**Understand** how automation, analytics and cloud strategies will drive ICT investment priorities for 2019

**Maximise** your market impact, by using Ovum's independent research to understand exactly what is driving government IT investment agendas at a country and regional level

**Stay ahead** of the competition, by understanding how to effectively position technology offerings to the policy and service needs of government agencies

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**Kevin Noonan**  
Lead Analyst

“The three biggest barriers to agencies undertaking digital programs are security, lack of internal skills, and to many other programs on the go.”



# Key Deliverables



**ICT Enterprise Insights** – Global survey of government agency pain points and IT buying intentions for 2019-20



**ICT Spending Forecasts** – Global 5 year projections for government IT spending, segmented by country, source and line of business



**Ovum Decision Matrix** – Analysis of the leading vendors solutions in key areas

## Themes for 2019

### **Managing the real opportunities for cognitive computing and process automation**

As the government sector continues to look for productivity improvements, many are looking more closely at potential opportunities for cognitive computing. Next generation technologies offer significant potential to governments, but the hype has sometimes exceeded the reality. Ovum will take a close look at government case studies, and practical lessons learned.

### **Executive leadership in the digital government era**

Many governments have already moved beyond high level digital strategies and statements of intent. The big challenge for 2019 will be to deliver practical outcomes and provide clear leadership, at a time when expectations are already high. Much has already been written about the theory of digital leadership, but much more work needs to be done looking at lessons learned and practical leadership strategies.

### **Moving from agile methodologies to agile organizations**

Agile initiatives are already growing in popularity as a key component of government modernization plans. However, many government agencies are encountering difficulties when contemporary technologies are applied to traditional organization structures, particularly where these organizations are reluctant to change. Ovum will investigate which technologies and business processes are delivering successful outcomes.

# Infrastructure Solutions

## The Market Challenge

Digital transformation is the main driver for technological change, and software has become the universal commodity driving today's enterprise infrastructure; both directly and via service providers. This software must be integrated into how services and systems are managed and delivered; and while it is still maturing, a cloud-centric approach is the future. The adoption of a hybrid and multi-cloud approach to IT service delivery is key, combined with a strong underpinning of security and compliance to ensure that corporate services and assets are not compromised. Organizations that cannot move fast enough to modernize their systems, provide everything on demand, and compete with cloud-native rivals will suffer. Similarly, vendors and service providers that only offer the base product/service without broad recognition of the digital transformation picture will experience difficulties in engaging with these enterprises.



## How Ovum helps you

**Address security complexity** with a platform approach to cybersecurity, embracing automation, and enhancing service provider support.

**Secure and deliver corporate data** in line with confidentiality, integrity, and availability requirements.

**Bring IT services closer** to the business, improving the speed and security of IT delivery.

**Strategize** for and exploit cloud-based integration and APIs for agile digital business integration.

**Consider a strategy** to adopt edge computing as an integrated component of a cloud-centric architecture.

**Identify growth opportunities** to target infrastructure-focused, cloud-centric enterprise products and services.

**Build capabilities to address infrastructure** product and service gaps faced by enterprises.

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**Maxine Holt**  
Research Director



“70% of companies with 10,000+ employees are modernizing legacy IT environments”



## Key Deliverables



**Ovum Decision Matrix** – comparative evaluation of the leading infrastructure technology products.



**Market Radar** – product capability comparisons for emerging technology areas in infrastructure.



**Case Study** – recommendations, best practice, and advice from real-world product and service deployments.



**Software Market Forecast** – a five-year view on growth in infrastructure software markets, segmented by vertical, region, and function, and updated annually.



**Technology Report:** a technical analysis and evaluation of new leading-edge technologies.

## Themes for 2019

### **Cybersecurity complexity demands platform and service provider support**

Today's organizations face an ever-evolving cyberthreat landscape, and high-profile security incidents and breaches will remain in the headlines. Driven by compliance demands as well as protecting reputation, significant investment in security products will continue. However, a more holistic view of cybersecurity posture is required, and organizations are evolving to a platform approach to reduce product complexity. Enterprises will continue to shift parts of their security operations to managed service providers.

### **Adopting a cloud-centric approach to modernize IT delivery**

Cloud-centric has evolved to include microservices and containers, as well as exploiting hybrid and multi-cloud environments. Organizations are adopting a cloud-centric approach to doing business. They are developing strategies for delivering everything-as-a-service and are modernizing corporate IT without ripping out existing investments. Service providers are following suit, developing their capabilities to be more easily consumable by the enterprise. Digital transformation has turned the spotlight on software, edge computing, and integration; all increasingly delivered by service providers.

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# Insurance

## The Market Challenge

The insurance sector has experienced major change over the last decade through regulation, radically changed customer expectations and technology. This pace of change, particularly around technology, is set to accelerate further in the next five years. In Ovum's view the global insurance industry is entering a distinct new phase characterized by very different insurance products, new ways of interacting with customers, and challenged by a host of new entrants. The challenges for today's insurance industry is to understand the potential threats and opportunities posed by technology, how it can be effectively exploited and who are the most appropriate partners.



## How Ovum helps you

**Understand** how key technologies will impact your particular insurance sector, region and organization

**Maximise** your market impact, by using Ovum's independent research to understand exactly what is driving insurer IT investment agendas at a country and regional level

**Stay ahead** of the competition, by understanding how to effectively position technology offerings to the business needs of insurers

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**Charles Juniper**  
Principal Analyst



“71% of North American and European insurers see companies like Google, Amazon and Facebook as a more significant competitive threat than their peer insurers in terms of delivering an IoT-based insurance proposition”



## Key Deliverables



**ICT Enterprise Insights** – Global survey of insurer pain points and IT buying intentions for 2018-19



**ICT Spending Forecasts** – Global 5 year projections for insurance IT spending, segmented by country, source and line of business



**Ovum Decision Matrix** – Analysis of the leading vendor solutions in key areas, including IoT Insurance Service Providers

## Themes for 2019

### IoT Insurance 2.0

The vehicle insurance sector has used telematics and IoT to offer usage-based insurance (UBI), but now insurers need to build on this to not only enhance today's vehicle offerings, but also to deliver IoT based proposition across other sectors such as home, commercial and life insurance. IoT insurance 2.0 will allow insurers to move from today's product-focused, retrospective compensation offerings, towards that of a proactive and personalized risk management proposition characterized by an ongoing dialogue that adds value for the policy holder.

### Delivering value engagement

With increasing competition, how can the insurance industry deliver a seamless, convenient and innovative digital customer experience that is seen to be of meaningful value by the customer? Critical to this will be the role played by technologies such as RPA, machine learning, natural language processing, and augmented reality, to deliver a highly personalised and contextually relevant insurance proposition. Small and mid-size insurers in particular need to find ways to effectively exploit new technology and to not get left behind in the 'technology race' by large well-resourced carriers or agile 'insurtech' start-ups.

### Becoming the digital insurer

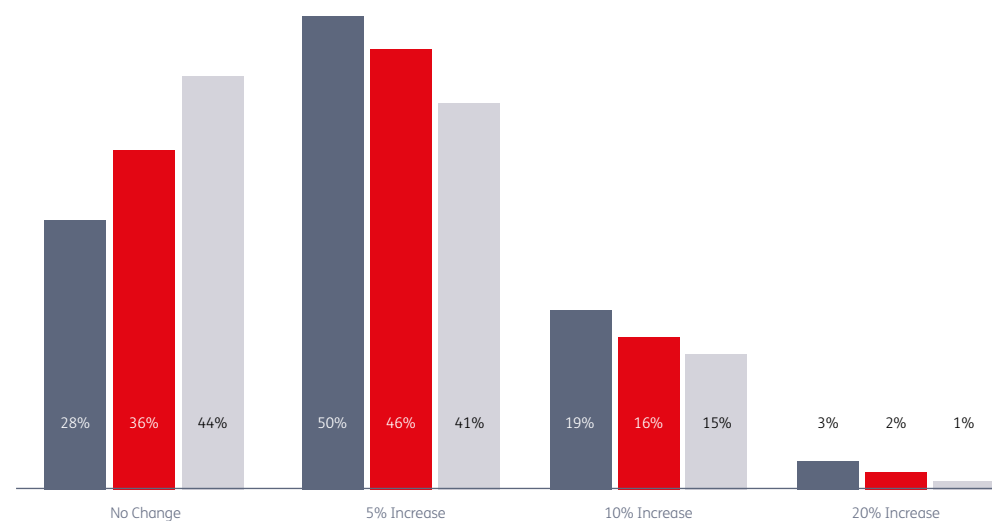
Carriers need to fully utilize technologies such as cloud, SaaS, blockchain and advanced RPA at the core of their operations to provide the organizational agility needed in response to the changes demanded by customers, regulators, competitors and emerging competitive threats. As the market dynamics continue to exert pressure on insurers, resolving the perennial issue of legacy modernization becomes even more critical. Ovum's research can help insurers to understand how best to deploy these technologies and map a route to becoming a digital insurer.

## What's new

**Deep focus** on the opportunities presented by artificial intelligence and IoT technology; the biggest drivers for change across the global insurance industry

**Insurance Software Contracts Analytics** – monthly analysis of insurer and vendor partnerships

**If an insurer provided the most important services you selected, how much additional premium would you be prepared to pay?**



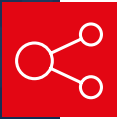


# Media Technology

## The Market Challenge

Building a cost effective personalized life-time engagement is fast becoming the core business challenge for media enterprises. A second wave of personalization – personalization 2.0 – will require premium content providers to deliver a highly tailored experience at multiple touch points across the customer journey.

Top business priorities include improving operational productivity and streamlined delivery, partly driven by the surge in audience acquisition costs. Unified user experience on multiple devices anywhere everywhere is also key in today's highly competitive multi-screen video services segment. Last but not least, real-time monitoring, tracking and protection of digital assets is essential, because the rising cost of premium digital asset acquisition means that media companies need to safeguard content across the content supply chain.



## How Ovum helps you

**Delivering key insights** on media technology adoption trends, to aid our clients with their investment and development plans

**Helping media companies** to leverage the right vendors for their workflow unification, automation, and orchestration needs

**Identifying** appropriate user experience and user interface technologies to deliver personalization

**Evaluating** partner ecosystems in the personalization 2.0 era

**Assisting media enterprises** with business and technology road-maps across the media content supply chain

**Identifying** new market opportunities in niche media segments such as travel & tourism, business TV, and theme parks

**Identifying strategies** to address piracy revenue leakage

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**Kedar Mohite**  
Principal Consultant

“The global TV and video anti-piracy services segment is already worth \$1.1bn, but with strong year-on-year growth it is expected to more than double in size by 2021.”

## Key Deliverables



**Innovation case studies** across premium media asset segments, including coverage of broadcast TV & video, sports franchises, and digital service providers (cable TV, satellite TV, and telecommunication media services business).



**On the Radar deliverables** around TV & video piracy detection and prevention technologies along with ad fraud.



**Media transformation ICT Services forecast** - encompassing TV & video broadcasters, sports franchises and digital service providers, as well as new theme parks and video gaming segments.



**Strategic assessment**, and SWOT analysis of vendors in the workflow unification and orchestration segments



**Opinion and short research notes** on personalized recommendation, content search, syndication, and data discovery vendors in the media & entertainment vertical

## Themes for 2019

### Unification of the media content supply chain

Ovum research suggests that one of the top three business challenges facing media enterprises is the creation of a single media content supply chain. The unification of linear and non-linear TV & video workflows is necessary to reduce the inefficiencies stemming from multiple, unstructured approaches. New technologies are required to enable synergies between multiple customer engagement channels.

Change will also be driven by the arrival of 5G, which deliver to on its promise of new business models will require streamlined digital user lifecycle management and well-trusted partner management.

### Delivering personalization and a converged user experience

Creating a highly tailored experience at multiple touch points across the customer journey is a complex and capital-intensive process but is capable of delivering clear long-term benefits for premium content owners. Media companies will need to leverage new technologies to support real-time user experience customization for digital users. Delivering a unified user experience across multiple devices will also be essential.

### Managed Security as a Service across the value chain

Building a horizontally integrated secured content supply chain will help to not only lower revenues leakage but also to improve returns on premium media assets. Ovum estimates that in 2018, digital TV & video piracy losses amounted to over \$37bn. Continuous real-time tracking, detection and prevention of security breaches will be crucial if media enterprises are to strengthen their market penetration in the highly competitive multi-screen video services market. Managed security as a service will play a strong role.

## What's new

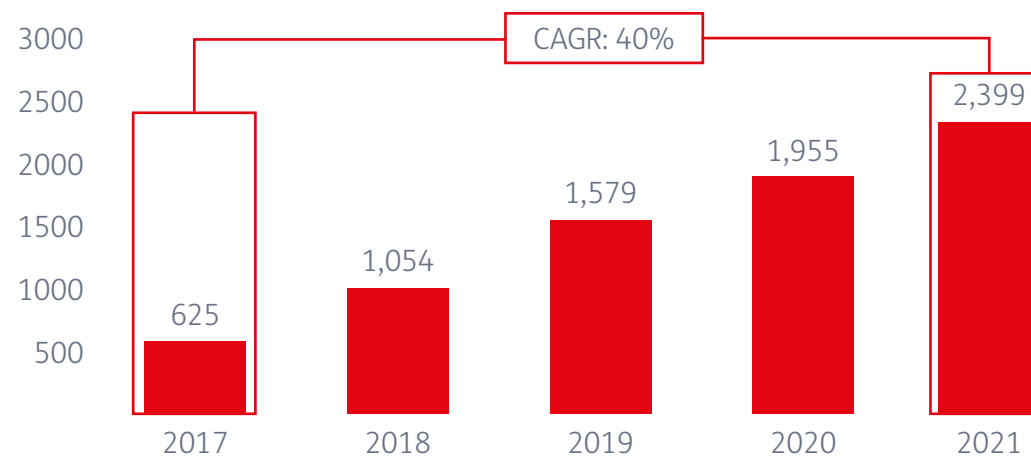
**Analysis of personalized recommendation technologies** in time-bound areas such as sports and live events

**SWOT analysis of new technology stacks** based around unification and orchestration of linear, and non-linear TV & video workflows

**Forecast of global TV & video anti-piracy services** – including segments such as video games, film and sports franchises.

**Forecast of global premium media content protection technologies** – including technology stacks such as DRM, watermarking, fingerprinting, and paywalls.

### Global TV & video anti-piracy services spend (2017-2021) \$mn



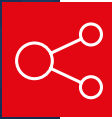


# Payments

## The Market Challenge

The payments industry is in the midst of huge change. The need to deliver on the growing expectations of retail, SME and corporate customers is putting a renewed emphasis on new product development and wider service enhancements, with the challenges posed by new entrants and challengers in the ecosystem providing further emphasis for change and innovation.

While many of the challenges facing today's market incumbents are not new, today's market landscape has set the scene for considerable disruption. In particular, the combination of new real-time payments infrastructure and open banking initiatives will be at the heart of many technology investment decisions in 2019. The ability to support the industry in delivering innovation, and new revenue sources, through partnerships with third parties will be critical for service providers.



## How Ovum helps you

**Maximise** your market impact, by using Ovum's independent research to understand exactly what is driving payments IT investment agendas at a country and regional level

**Benchmark** against your competition, with independent verification of the market leaders, challengers and followers in Ovum's Decision Matrix series

**Stay ahead** of the competition, by understanding where and how new entrants, digital service providers and established vendors are bringing new products and services to market

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**Kieran Hines**  
Head of Industries

“Total IT spending on payments-related software and services will reach \$56 billion in 2021”

# Key Deliverables



**ICT Enterprise Insights** – Global survey of payment provider pain points and IT buying intentions for 2019-20



**ICT Spending Forecasts** – Global 5 year projections for payments IT spending, segmented by country, source and line of business



**Ovum Decision Matrix** – Analysis of the leading vendors solutions in key areas, including card management platforms, white label digital wallets, and payment switch

# Themes for 2019

## Open Banking and the future financial services value chain

The concept of Open Banking has rapidly grown in prominence, as a rising number of national regulators and individual institutions look to take advantage of the opportunities this presents to both accelerate the pace of competition while revolutionising the way banks and third parties consume and deliver banking services. While the impact of these changes will remain reasonably limited in the near term, Open Banking will accelerate the pace of competition and new entry in the medium term, leading to entirely new service offerings for corporate, retail and SME customers. Understanding where and how to prioritise investments in this area has never been more important.

## Delivering the next generation of payment services through core systems enhancement

The need to respond to the increasingly complex market and competitive landscape will continue to drive investment in modern, flexible systems and architecture to deliver both greater efficiency and support growth. In addition to delivering headline initiatives around areas such as open banking and real-time payments, security, product development and continued enhancements to the digital experience are all important focus areas. As a consequence, investments in areas such as automation, machine learning, NLP, distributed ledger will remain high, with cloud coming into greater prominence for both infrastructure and software consumption.

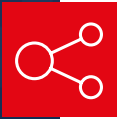
## Maximising the potential of real-time payments

As the roll-out and adoption of new real-time payments infrastructure continues apace, unlocking the potential to deliver new and enhanced customer propositions is a key topic. For banks, layering new services on top of real-time payments infrastructure is the biggest opportunity in a generation to respond to the growing importance of third party players in the retail payments space, particularly in P2P and ecommerce. On the corporate side, cross-border real-time payments, supply chain, customer disbursements and refunds, and the billing experience are major opportunities to grow revenues and improve the customer proposition. In some cases, this will require discrete investments, while others must be viewed as part of the Open Banking opportunity.

# Retail banking

## The Market Challenge

While interest rates are slowly moving closer to historic norms, achieving top-line revenue growth will remain challenging and driving efficiency improvement will persist as the key driver for driving financial return. However, the industry itself is being disrupted. Regulatory change is forcing banks to expose their systems through APIs, challenging banks as to where they play in the value chain, which is also being cherry-picked by FinTechs benefiting from the cost advantages of cloud and reach of mobile-based models. The imperatives of regulatory compliance and efficiency remain, but driving through digital transformation and delivering innovation has shifted from important to critical, with artificial intelligence and automation the next big technology waves for the sector to enable this change.



## How Ovum helps you

**Understand** how regulatory imperatives and digital transformation strategies will drive ICT investment priorities for 2019

**Maximise** your market impact, by using Ovum's independent research to understand exactly what is driving retail bank IT investment agendas at a country and regional level

**Stay ahead** of the competition, by understanding how to effectively position technology offerings to the business needs of retail banks

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**Daniel Mayo**

Director, Ovum IT Data Tools & Insights

“Retail banks will spend close to \$150bn on ICT in 2019.”



## Key Deliverables



**ICT Enterprise Insights** – Global survey of retail bank pain points and IT buying intentions for 2018-19



**ICT Spending Forecasts** – Global 5 year projections for retail bank IT spending, segmented by country, source and line of business



**Banking Software Contracts Analytics** – Global analysis of packaged software deals, segmented by institution, vendor and solution area



**Ovum Decision Matrix** – Analysis of the leading vendors

## Themes for 2019

### Delivering the digital customer experience

Attention to the digital experience has shifted to realization that actual customer experience in the digital economy extends to all channels and customer-facing processes that support these. Delivering a seamless, straight-through experience that supports the wider customer journey is critical, but requires platforms that can manage the user-experience, taking advantage of the potential of open API initiatives, and new technologies in biometrics, augmented reality, natural language processing and AI-based services to enhance both human and direct customer engagement.

### Driving intelligent digital transformation through AI

As banks realize digital is about the bank itself rather than a channel, there has been increasing assessment of how culture, governance, processes, and structures enable banks to operate in a digital world. While such transformation must occur at the business level, this is also driving significant change for technology, requiring platform modernization, new approaches to delivery, and ability to source and adopt new technologies and systems more effectively. The role of automation technologies, particularly robotic process automation, and artificial intelligence are becoming in driving both efficiency, but to allow banks to interact more intelligently in digital world.

### Managing risk, security and compliance

The basics of banking – managing risk and providing security – remain core tenets of the digital world, with challenges intensifying as connectivity and external threats increase. Simultaneously, regulatory demands around financial crime and compliance management continue to escalate, with criminals increasingly innovate in their fraud attacks (such as synthetic identities). Technology advances with Big Data, artificial intelligence, data streaming processing and security offer potential solutions to balance the pressures of mandatory requirements and cost, but understanding real use cases and developing strategies to ensure these fit together effectively is critical for actually delivering potential benefits.

# SoHo & SME Services

## The Market Challenge

For digital service providers, reaching the small business universe presents unique challenges. They often look like mass market customers, but they have more complex needs. Their technology requirements vary by industry, but their internal IT is often under-skilled or absent. They crave support, but don't have the customer lifetime value to justify a dedicated account manager.

Most irritating of all, these realities add up to a customer that – for now at least – usually won't self serve.

Cracking this profit conundrum demands the right channel mix, a value proposition calibrated to the right buyer persona, and a pitch with a light industry-specific veneer.



## How Ovum helps you

**Empower** – identify compelling, profitable digital services which help smaller businesses to thrive.

**Simplify** – craft integrated propositions that overcome digital service providers' internal silos to address customers' validated needs.

**Engage** – determine the correct blend of physical and virtual channels to engage different buyer personas.

**Support** – help bridge the digital skills gap between small and large businesses and accelerate transformation.

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**Camille Mendler**  
Practice Leader

“Nine out of 10 SMEs believe digital services can improve their business – but half say they are digitally illiterate.”

## Key Deliverables



**SoHo and SMEs Insights** – digital demand perspectives across developed and emerging economies.



**Profiles and case studies** – highlighting success and key learnings in addressing the small business universe.



**Forecasts across major B2B services** – consistent segmentation for SoHo and SMEs across core cloud, UC, and broadband services.



**Rapid analysis** – the implications of key market events.

## Themes for 2019

### Creating the Digital SME

Small businesses need to digitize in order to thrive in today's world. But how to choose and deploy the right blend of digital services is a challenge for buyers and sellers alike. Ovum continues to advise on the professional and managed services that SMEs need to invest in – such as cloud apps, collaboration tools and security – as well as who is best positioned to deliver them.

### Engaging the Digital SME

Doing business in the digital world – being found and engaging and delighting customers – is a leading imperative for small businesses around the world. And they expect no different from their suppliers. Ovum's global experts provide multi-faceted guidance on B2B customer engagement: how to deliver the digital journeys that SMEs demand, and how to help SMEs become thriving digital actors.

### Disruptive B2B ecosystems

There is a secret war for B2B budgets that few know is underway – and it's focused on smaller businesses. New B2B platform players are bypassing traditional technology sales structures and are redefining how to engage with smaller businesses, taking control over technology spending. Ovum can help suppliers understand how to play in the new B2B world order – and who is a friend or a foe.

### Empowering the Entrepreneur

The small business universe continues to grow – and that's thanks to entrepreneurs. Whether solo players at home, startups in a coworking space, or other micro businesses, these organizations have unique needs which are too often overlooked. Ovum's multi-disciplinary team advises on the tools, techniques and partnerships that young businesses need to survive and thrive.



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## What's new

**2018/19: SoHo and SME Insights Survey** – investment plans, aspirations, challenges and digital behaviors of the world's smaller businesses.

**Channel programs** – identifying the right partner and comparing approaches to boosting productivity and loyalty.

**Global B2B Demographics Tool** – a Rosetta Stone to the global B2B universe designed to support targeting and opportunity sizing – will be upgraded with additional countries and estimates on the informal economy.

## SME services must be 'snackable'



# Telecom Operations & IT

## The Market Challenge

CSPs know that they need to transition to a Digital Service Provider model, but are often daunted by the scale of the IT systems, operations and business changes they need to implement.

Transformation needs to span customer and business enablement, service development, automation and cloud-based delivery models; and to be underpinned by intelligent operations involving AI and advanced analytics tools. Next-gen networks and the imminent arrival of 5G add urgency to the situation.

To address all this, CSPs need to understand what technology and operations changes will work, and vendors need to understand the capabilities to deliver and the opportunities to target.



## How Ovum helps you

**Help CSPs understand** their business and digital transformation needs and to prioritise the appropriate technology investments

**Support CSPs** with their IT investment and buying decisions, including product assessments

**Identify** CSPs decision criteria for selecting platform and service partners to enable digital transformation.

**Help CSPs leverage** the right vendors to assist with their network analytics and automation needs

**Understand** the main growth opportunities across the complex telco IT landscape

**Evaluate** vendor competitive position in key solution areas versus peers from NEP, ISV, and CSI backgrounds.

**Identify** new product, service, and partnering opportunities in a rapidly changing and increasingly complex ecosystem.



**Kris Szaniawski**  
Practice Leader

“Creating a personalized customer experience is a top business priority for CSPs, with over 90% considering it important”

# Key Deliverables



**Coordinated set of forecasts covering Telco IT** (incl. OSS/BSS) revenues, Vendor services revenues in the telecom sector and Telco IT spend.



**Research on the role of AI**, analytics, automation and blockchain in improving CSP operational efficiency, security and network monetization .



**Strategies** for managing and monetizing the growing CSP customer and partnership ecosystem using improved customer engagement and customer journey management tools, and partner management systems.



**Ovum Decision Matrices** – evaluating leading telco IT solutions, including customer engagement platforms



**ICT Enterprise Insights in the Telecoms Industry** – CIO insights and investment plans in key telco IT areas



**OSS/BSS contract analytics interactive tool** with global coverage as well as annual analysis of OSS/BSS contract trends

# Themes for 2019

## Successful CSP strategies for digital transformation

Digital transformation has become a necessity for CSPs, but many are still uncertain of which enabling technologies and operational changes to prioritise. Through a series of industry case studies and thought-leadership pieces we will explore how CSPs can transition to Digital Service Providers. This will include cross-Ovum digital transformation research identifying technology and operational priorities spanning customer and business enablement, service delivery, intelligent operations, automation and cloud-based delivery models.

## Intelligent operations as a source of innovation

Intelligence is playing an increasingly important role in automating and transforming CSP operations. We will explore the impact of AI, analytics and blockchain on customer experience, operational efficiency and security in the telecom sector, as well as their role in supporting new business models and technologies linked to IoT, 5G and digital services. We will profile technologies, strategies and use cases focused on the telecom sector.

## Radically improving customer and partner management

CSPs need to improve customer engagement and invest in customer management solutions that deliver a personalized customer experience. CSPs will also need to better manage a rapidly expanding partner ecosystem with partner management systems. We will also explore how CSPs can leverage data from OSS, BSS and other sources such as IoT to better manage and personalize the customer journey and improve engagement with B2C and B2B customers. Ovum will provide thought-leadership on strategies, technologies and the vendor landscape.

## Preparing telco IT for the arrival of 5G and next-gen networks

Next-gen networks and the imminent arrival of 5G add urgency to the need to transform telco IT and operations. These will have to be capable of supporting dynamic scaling, network slicing and help monetize new business models. Topics will include cloud-based delivery models, service management and orchestration, automation, open APIs and collaborative working, as well as how to coordinate charging, policy and analytics to better manage and monetize the network. We will explore CSP strategies and the changing role of vendors and services companies in supporting this new environment.



## What's new

**Digital transformation insights** – including cross-Ovum research focused on the technology and operations changes CSPs need to make to support their transition to Digital Service Providers

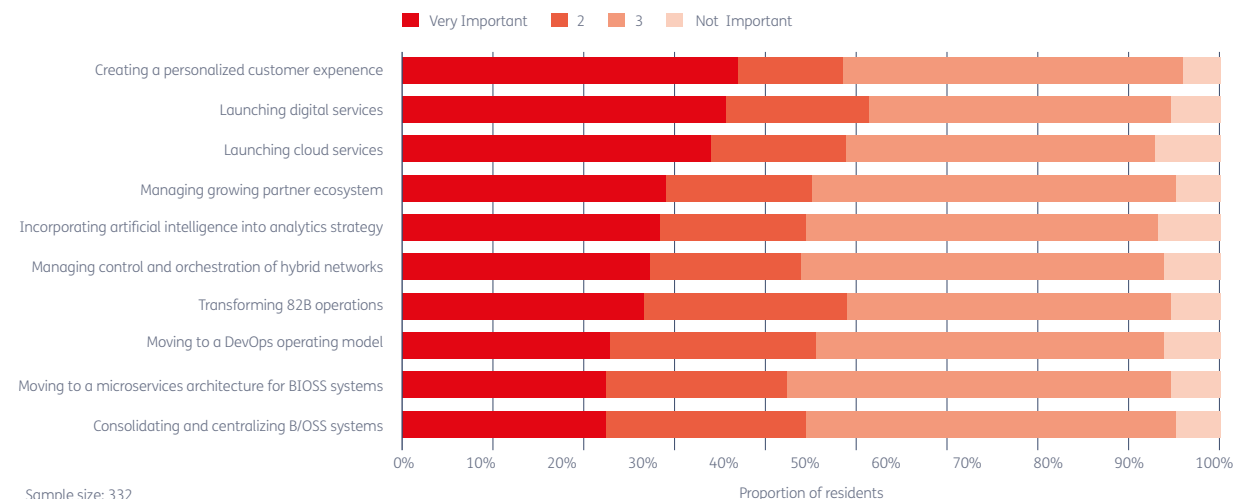
**Preparing telco IT** and operations for the arrival of 5G and next-generation networks

**Using AI** to streamline and automate BSS systems and revenue management processes

**Telco IT forecast** – increased breadth and granularity, including expanding the OSS/BSS coverage to encompass telecom analytics.

**Creating a personalized customer experience and launching digital services are considered to be a top business challenge facing CSPs**

### Business Challenges



# Workspace Services

## The Market Challenge

The introduction of new workplace technology and services goes hand-in-hand with new ways of working. Enterprises looking to transform how their employees work and how they interact with customers typically want to improve productivity, enhance customer service and reduce costs.

Businesses are looking for partners that can help them make this difficult and complex transition towards a modern workspace. To meet this demand, providers are building on their traditional enterprise mobility, UC&C, workspace virtualization, and managed security capabilities. However, they need to build their expertise beyond these services and into new areas of technology and professional services if they are to assist enterprises in meeting their business transformation objectives.



## How Ovum helps you

**Make sense of the complex digital workspace landscape** – how technologies fit together and who will emerge as potential partners.

**Identify the growth markets** – size the market opportunity and identify which segments will be key.

**Build the portfolio** – the important technologies and services are identified via our research.

**Transform services** – advice on where to partner and where to build expertise, as well as how to improve delivery and support.

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**Pauline Trotter**  
Principal Analyst

## Key Deliverables



**Ovum Decision Matrix** – compares unified endpoint management approaches.



**Ovum Mobile Workspace Service provider assessments** – for enterprises selecting a service provider partner for mobile workspace services.



**Forecasts for enterprise communication services** – enterprise mobility software & services and unified communications and collaboration forecasts.



**Use cases** – enterprise experience in evaluating, selecting, implementing, and measuring benefits from workspace tools and services.



**Vendor strategy updates** – provide insight on new workspace services, technologies, and business models from top providers and new entrants.

## Themes for 2019

### Mobilizing the workforce

Technology evolution and continuously changing employee needs are driving new approaches to how enterprises manage and secure devices, apps, identity, and the data that runs across them. Enterprise mobility solutions and services feature new capabilities such as cognitive analytics, identity management and single-sign on, unified endpoint management, and advanced group policy management. These advancements will support enterprises in more effectively managing a diverse device, OS, and data estate.

### Evolution of enterprise collaboration

The way that enterprises consume and deploy communications and collaboration services technology will change. More and more collaboration tools will be platform-driven, embedded into a diverse set of software, and available for use in multiple applications. CPaaS will integrate communications into business apps, AR will enhance traditional meetings, IoT will trigger communications events, and natural language recognition will provide new ways for people to interface with collaboration apps. This means cloud providers venturing into the collaboration space have a natural advantage and will increasingly challenge traditional or point providers.

### Delivering an integrated workspace

Service providers have been evolving their mobile workspace offers to incorporate UC&C services, virtualization, managed security, service delivery, and end user support. As this market evolves, we expect service providers (including telecoms companies, SIs, ITSPs and specialist managed service providers) to focus on helping enterprises deliver an integrated workspace encompassing fixed and mobile working styles. This will require significant investments in professional services skills, integrating new technologies, applications and tools into their services and bringing in new types of partners.

### Enterprise use cases for 5G

With 5G on the horizon, mobile network operators are starting to look seriously into how they will monetize the investment in the network and spectrum. Many operators believe that the business segment will provide the early adopters, and this is where the business case will be proved. This research will look at the early use cases for 5G in the enterprise segment, via research with vendors and service providers, and will focus on what early commercial offers might look like.





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## What's new

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**Use cases** – case studies of emerging business models from service providers and enterprises.

**Whole market view** – the enterprise workspace market in the context of the market as a whole.

**Unified endpoint management** – extended coverage of this key requirement.

**Video** - delivering opinion on key market developments and announcements.



# Get in Touch

Want to learn more?

[Click here](#) to request a callback.

