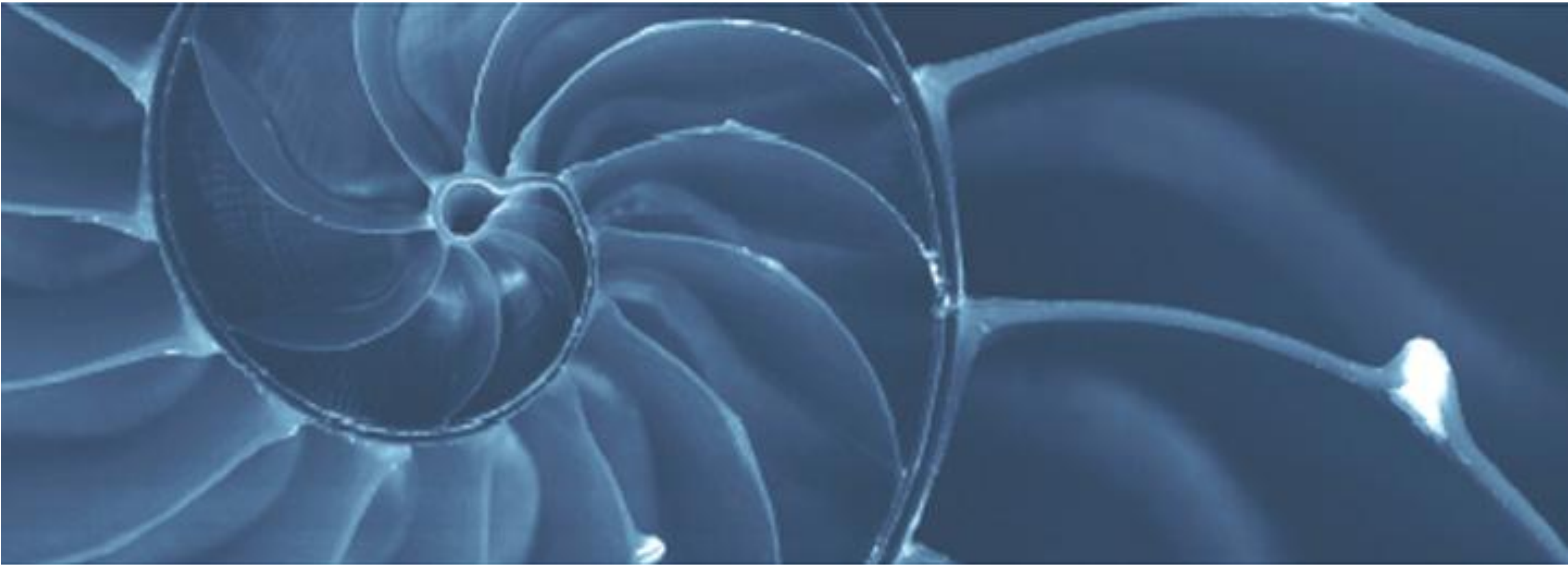
NCC Benchmark of IT Strategy Survey 2008



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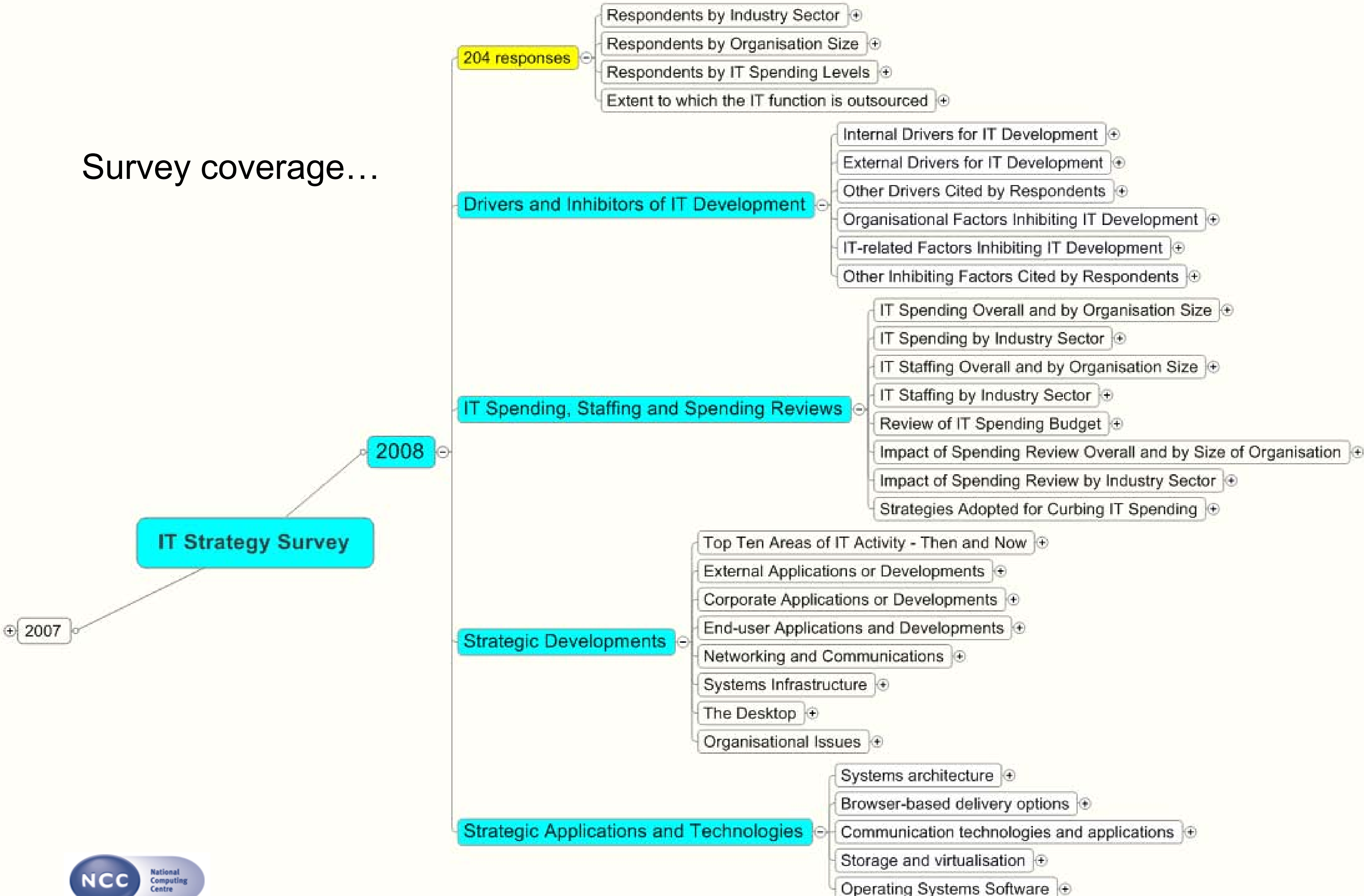
NCC
championing the effective use of IT/IS

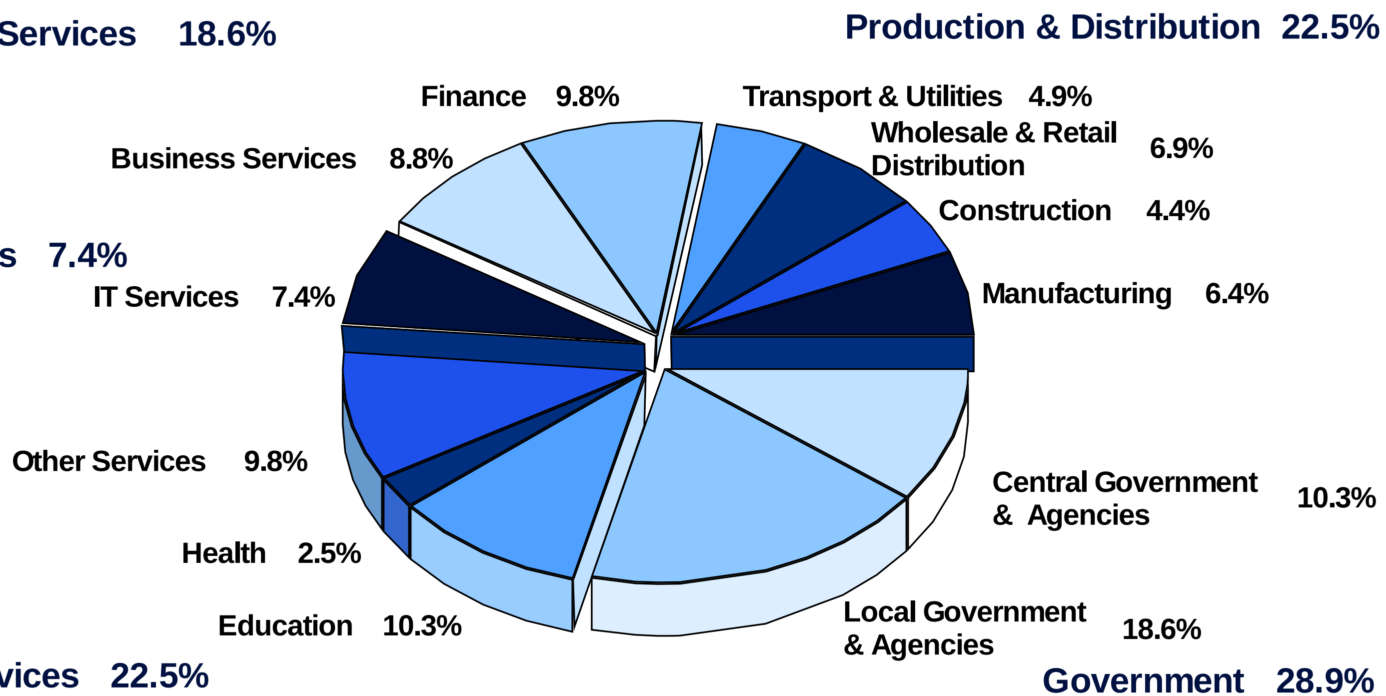
- Founded 1966
- Promote leading industry best practice in IT/IS
- Help end user organisations make effective use of IT
- Private & Public sector ~ 66/33 split
- Company limited by guarantee, members are the stakeholders
- 40+ years on, NCC delivers a continuum of services including
  - independent and impartial advice and support
  - best practice and standards
  - personal and professional development
  - managed service delivery
  - awareness raising, experience sharing, networking with end users, vendors & specialists

Survey coverage…



Survey 2008

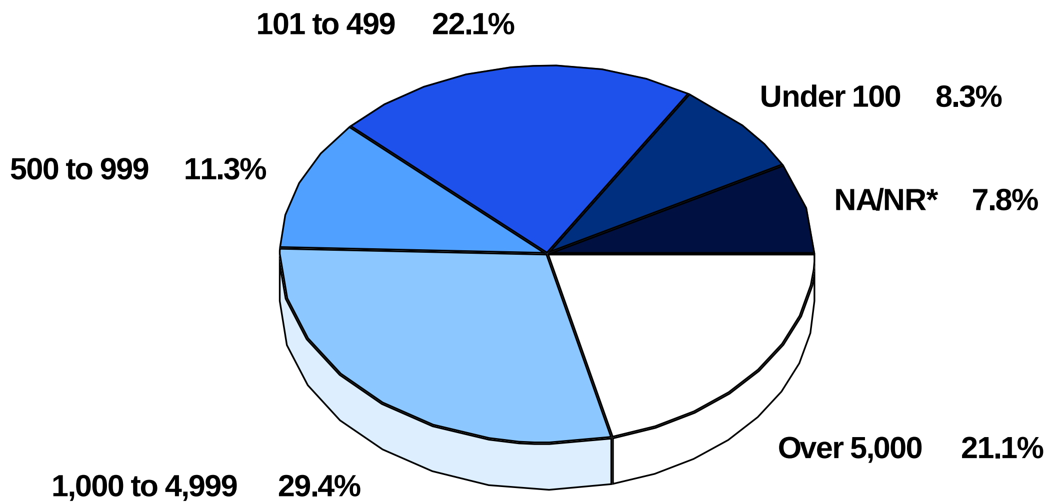
Breakdown of Respondents by Industry Sector



Survey 2008

Breakdown of Respondents by Organisation Size

Number of End-users

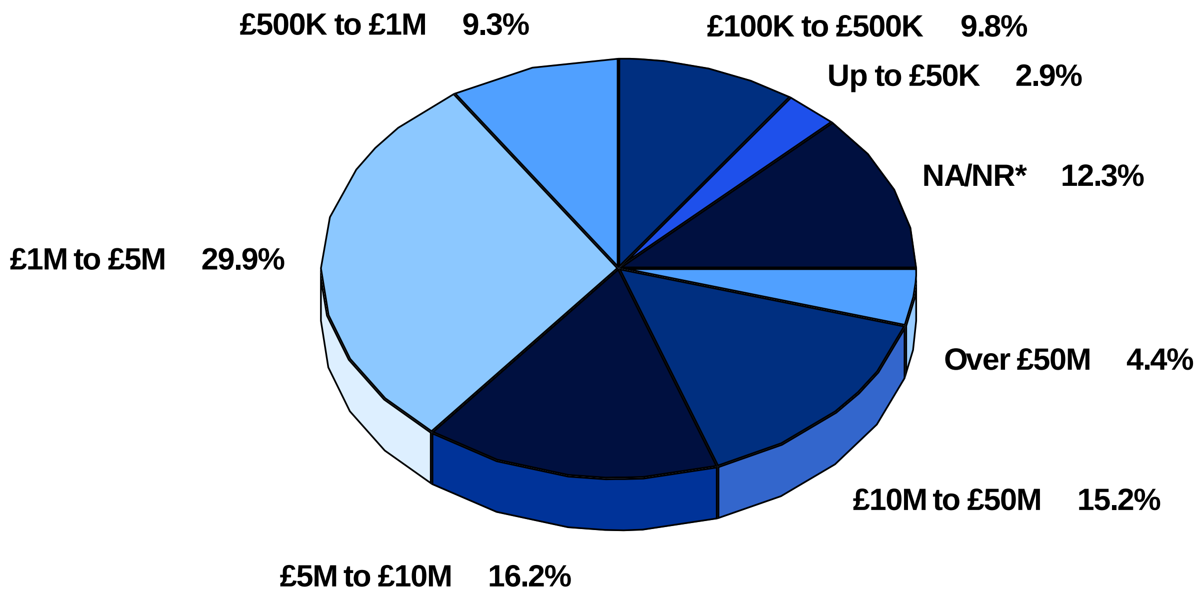


*NA/NR includes IT Services respondents

>50% have over 1000 end users

Survey 2008

Breakdown of Respondents by IT Spending



NA/NR includes IT Services respondents

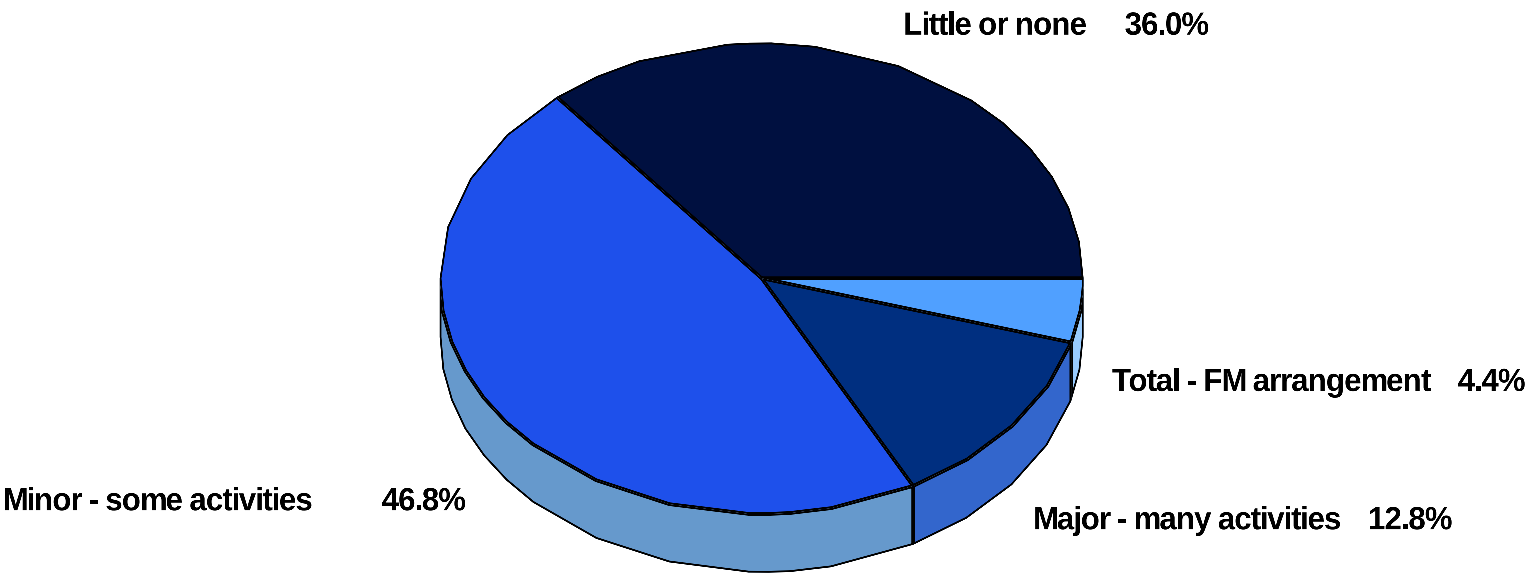
Survey 2008

IT Spending, Staffing and Spending Reviews

- A more detailed process of data collection and a more detailed analysis of IT spending is undertaken in NCC's Benchmark of IT Spending
- Figures reported here only give a broad indication of spending and staffing levels

Survey 2008
where the money is going

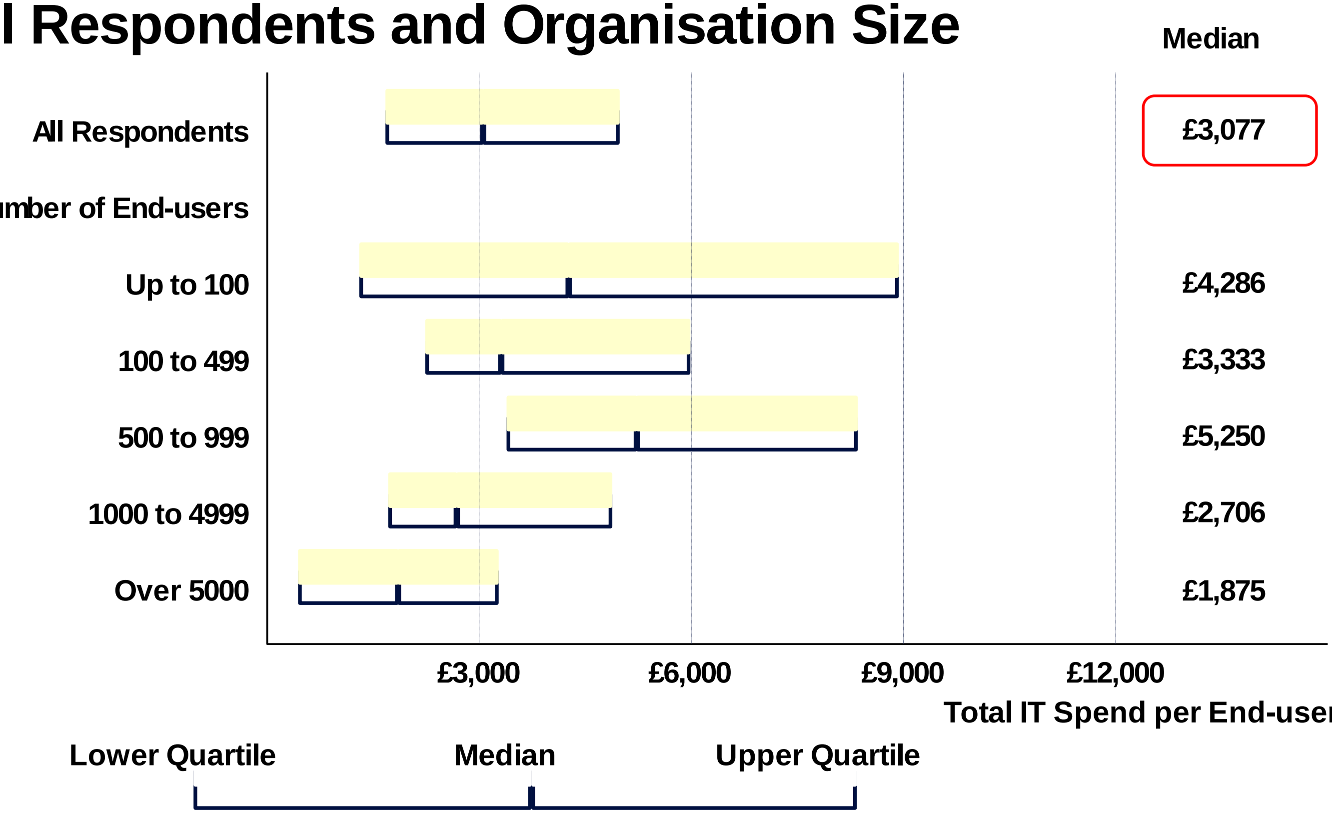
Extent of IT Outsourcing



Survey 2008

where the money is going

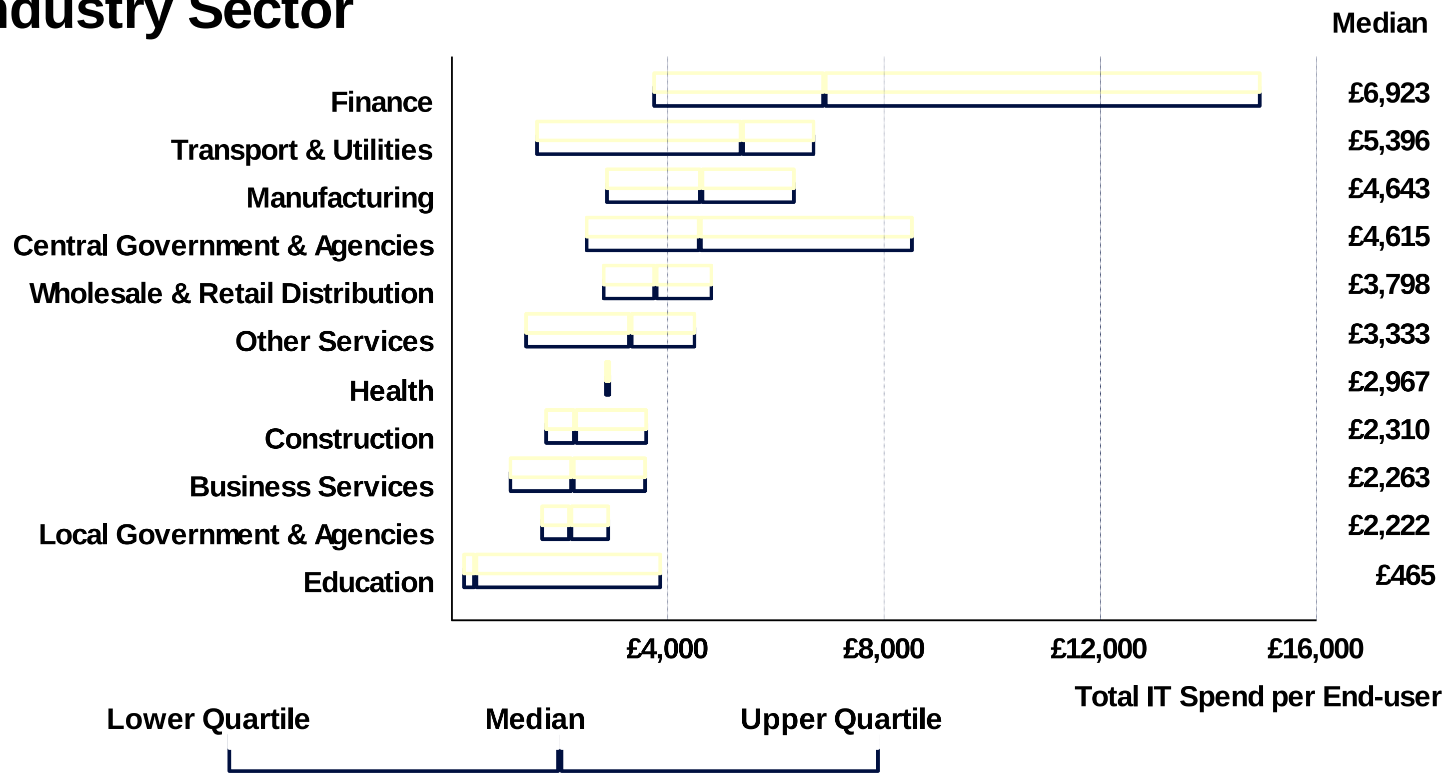
Total IT Spending per End-user
by All Respondents and Organisation Size



Survey 2008

where the money is going

Total IT Spending per End-user by Industry Sector



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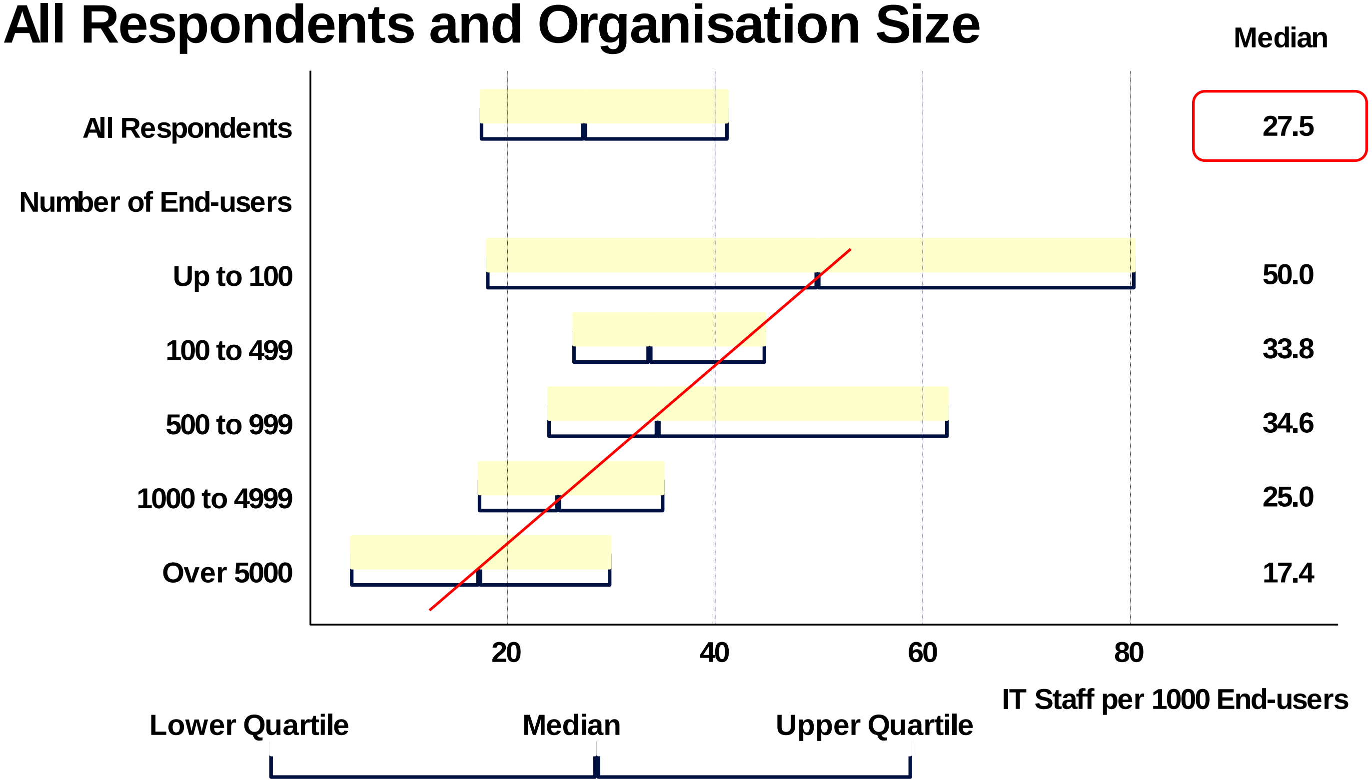
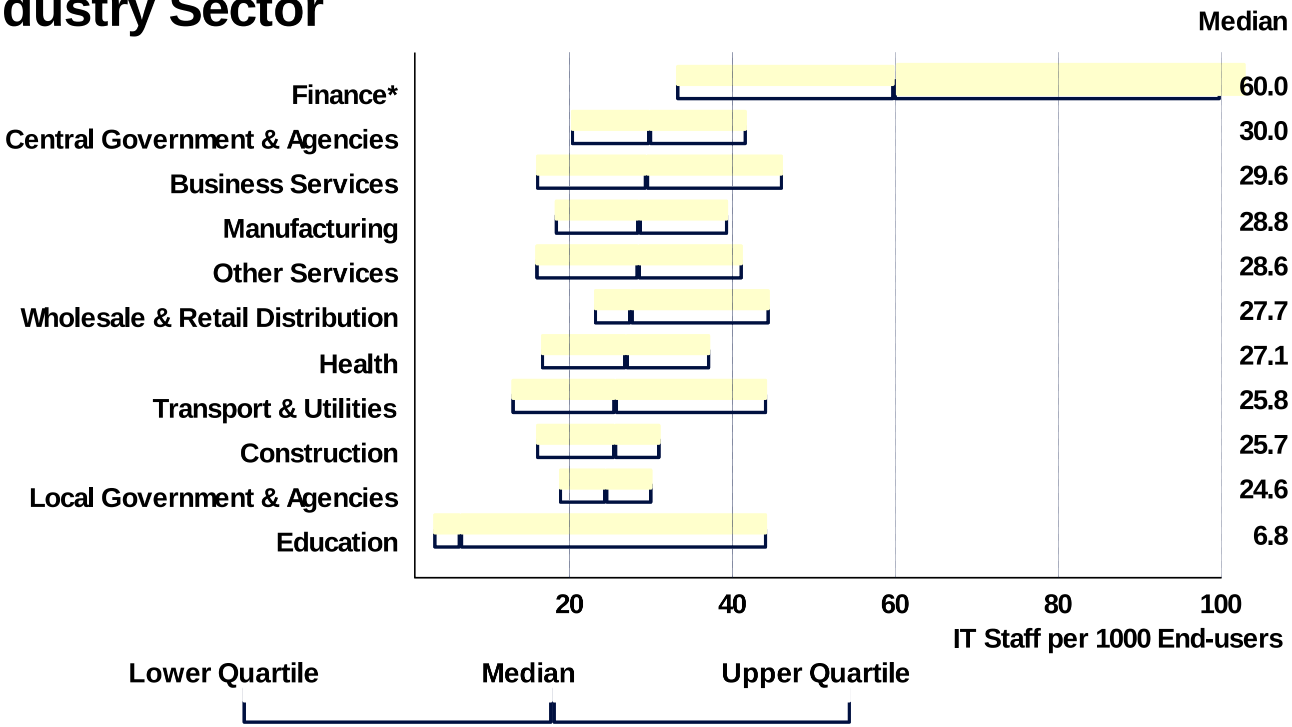
Survey 2008
where the money is going

IT Staff per 1000 End-users
by All Respondents and Organisation Size



Survey 2008
where the money is going

IT Staff per 1000 End-users by Industry Sector

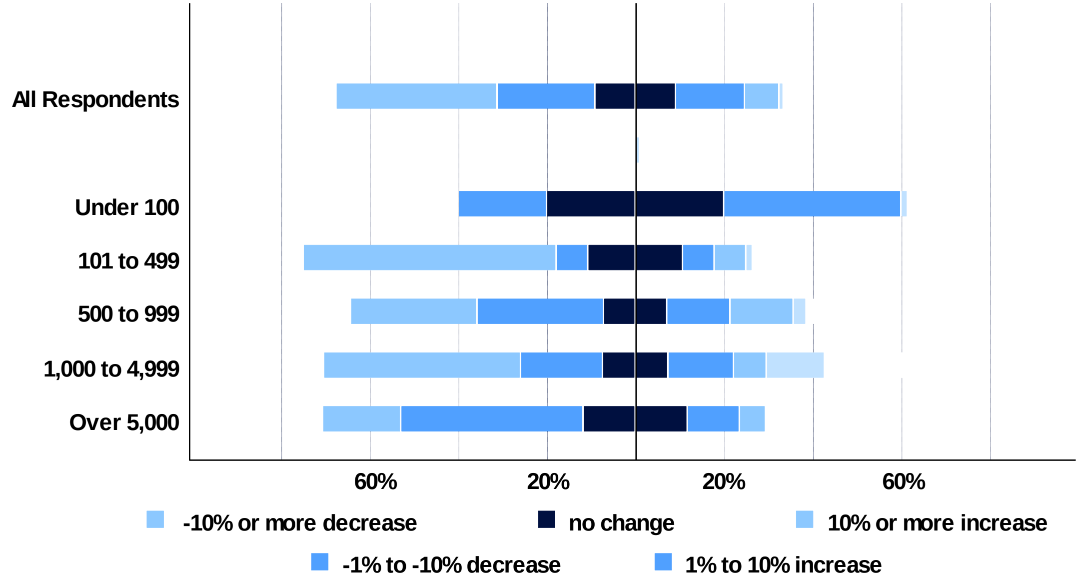


The upper quartile for the Finance Sector was 154 IT staff per 1000 end-users

Survey 2008
where the money is going

Respondents were asked whether they had reviewed their IT spending budget for the current financial year and to indicate any change…

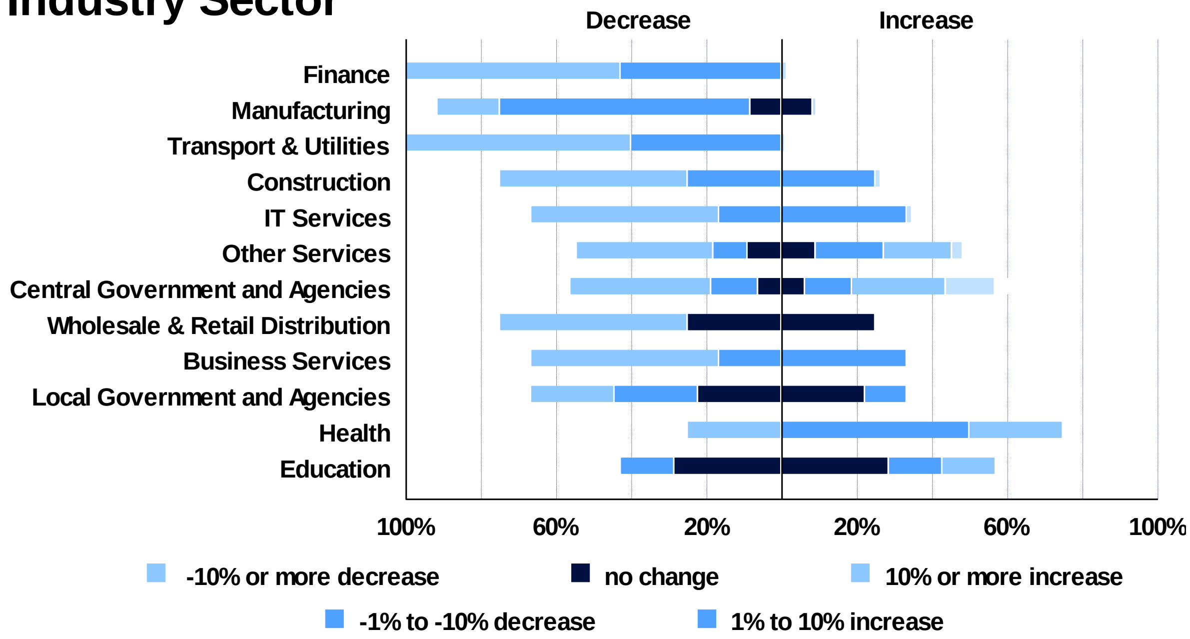
Change in IT Budget post-Review by All Respondents and Organisation Size



Survey 2008
where the money is going

Respondents were asked whether they had reviewed their IT spending budget for the current financial year and to indicate any change…

Change in IT Budget post-Review by Industry Sector



Survey 2008
strategies adopted for curbing spending

- *Spending re-forecast to year end and close examination of any expenditure yet to be incurred / committed*
- *Postponement of non-critical projects. Staff hire freeze*
- *Review discretionary spend vs. mandatory/ critical corporate projects. Non-essential IT project spend and non-essential IT general spend is frozen*

- *Staff cuts, scope reductions of projects, deliver other projects later*

- *Review of skills and expenditure on consultants and software*
- *Reduced salary increases, reduced budget for consultancy services*

4 Strategic Applications

4.1 Please assess the POTENTIAL significance for your organisation of the following IT technologies or applications, and indicate the CURRENT STATUS of developments in that area.

POTENTIAL	Technology / Application	CURRENT STATUS
Please select	Business Process Modelling / Management	Please select
Please select	Enterprise Architecture	Please select
Please select	Service Oriented Architecture (SOA)	Please select
Please select	Asynchronous Java and XML (AJAX)	Please select
Please select	Mashups	Please select
Please select	Rich Internet Application environments (e.g. Adobe Air, Microsoft Silverlight)	Please select
Please select	Mobile Computing / Remote Access	Please select
Please select	VoIP (Voice over Internet Protocol)	Please select
Please select	Mobile Email (Blackberry etc.)	Please select
Please select	SMS	Please select
Please select	Instant Messaging	Please select
Please select	Unified Communications	Please select
Please select	Storage Area Networks	Please select
Please select	Storage Optimisation	Please select
Please select	Server Virtualisation	Please select
Please select	Application / Appliance Virtualisation	Please select
Please select	Linux / Open Source Desktop	Please select
Please select	Linux / Open Source Server	Please select
Please select	Microsoft Windows Vista	Please select
Please select	Software as a Service (SaaS)	Please select
Please select	Other key technologies (please specify)	Plea
Please select		Plea

20 + 2 ‘other’

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4 Strategic Applications

4.1 Please assess the POTENTIAL significance for your organisation of the following IT technologies or applications, and indicate the CURRENT STATUS of developments in that area.

POTENTIAL	Technology / Application	CURRENT STATUS
Please select	Business Process Modelling / Management	Please select
Please select Not assessed / don't know Assessed and rejected Minor significance Major significance Key technology / application	Enterprise Architecture	Please select No progress Planned for future Pilot / initial development Partial implementation Widespread use / fully implemented
	Service Oriented Architecture (SOA)	
	Asynchronous Java and XML (AJAX)	
	Mashups	
Please select	Rich Internet Application environments (e.g. Adobe Air, Microsoft Silverlight)	Please select
Please select	Mobile Computing / Remote Access	Please select
Please select	VoIP (Voice over Internet Protocol)	Please select
Please select	Mobile Email (Blackberry etc.)	Please select
Please select	SMS	Please select
Please select	Instant Messaging	Please select
Please select	Unified Communications	Please select
Please select	Storage Area Networks	Please select
Please select	Storage Optimisation	Please select
Please select	Server Virtualisation	Please select
Please select	Application / Appliance Virtualisation	Please select
Please select	Linux / Open Source Desktop	Please select
Please select	Linux / Open Source Server	Please select
Please select	Microsoft Windows Vista	Please select
Please select	Software as a Service (SaaS)	Please select
Please select	**Other key technologies (please specify)**	Please select
Please select		Please select

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Survey 2008
strategic applications spending

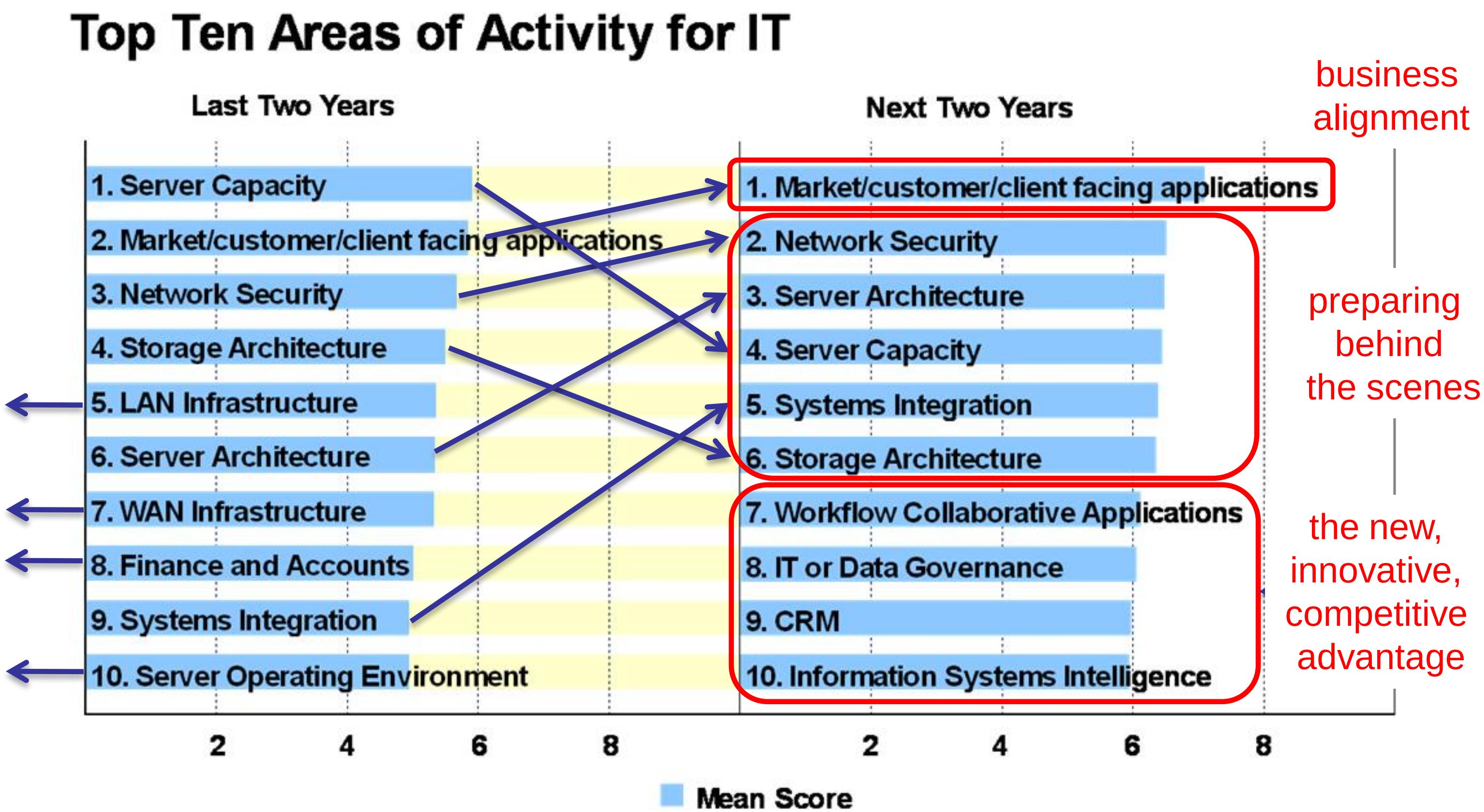
- *All areas expected to increase in importance over the next two years*
  - *more overall effort will be expended*
  - *more decisions about high/ low priorities*

- *The most popular area of activity is market, customer or client-facing applications, where almost 60% of respondents expect to make a major effort*

- *Activity in the area of IT or data governance is expected to triple over the next two years*

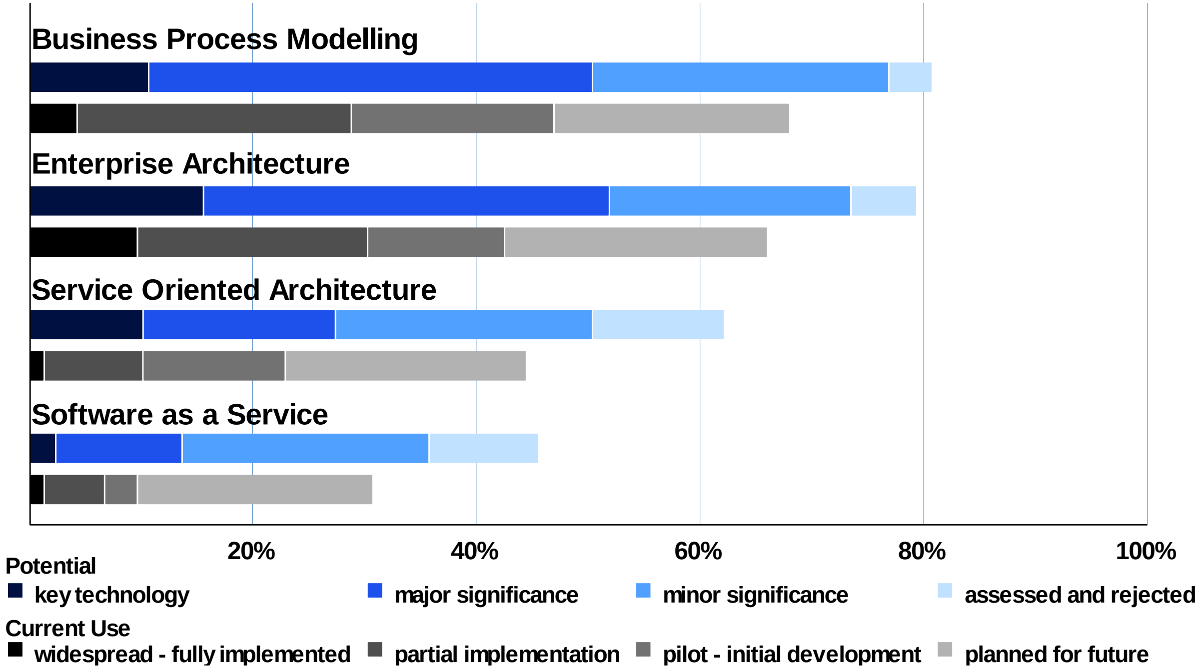
- *Only 4.2% of the respondents have carried out major developments over the past two years on green IT initiatives. However, 22.2% expect green to be a major focus over the next two years*

Survey 2008
strategic applications spending



Survey 2008
strategic applications spending

Potential and Current Use - Systems Methodologies

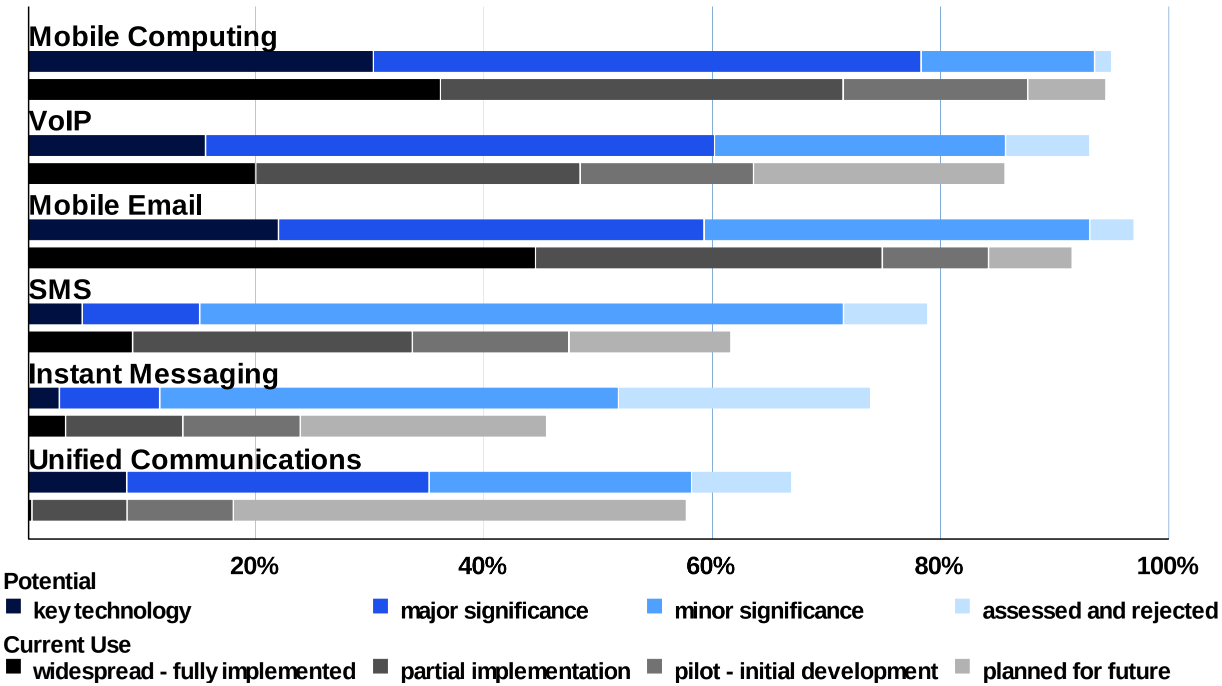


Only a small number of organisations have fully implemented Software as a Service (SaaS) in their organisation and all were in the Finance, Local Government or Education sectors.

Survey 2008

strategic applications spending

Potential and Current Use - Communications / Mobile

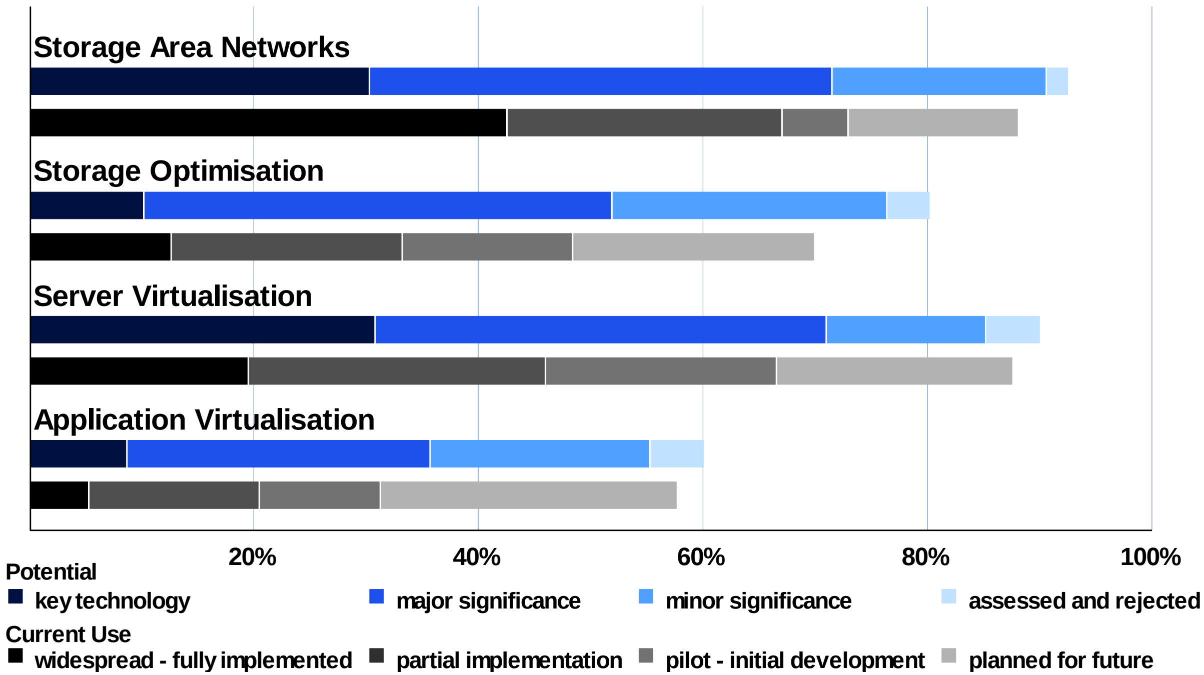


Unified communications technologies appear to be an area of significant potential growth.
40% of respondents planning developments in this area to add to the 18% who have already made some headway.
The larger organisations are leading the way in the implementation of unified communications.

Survey 2008

strategic applications spending

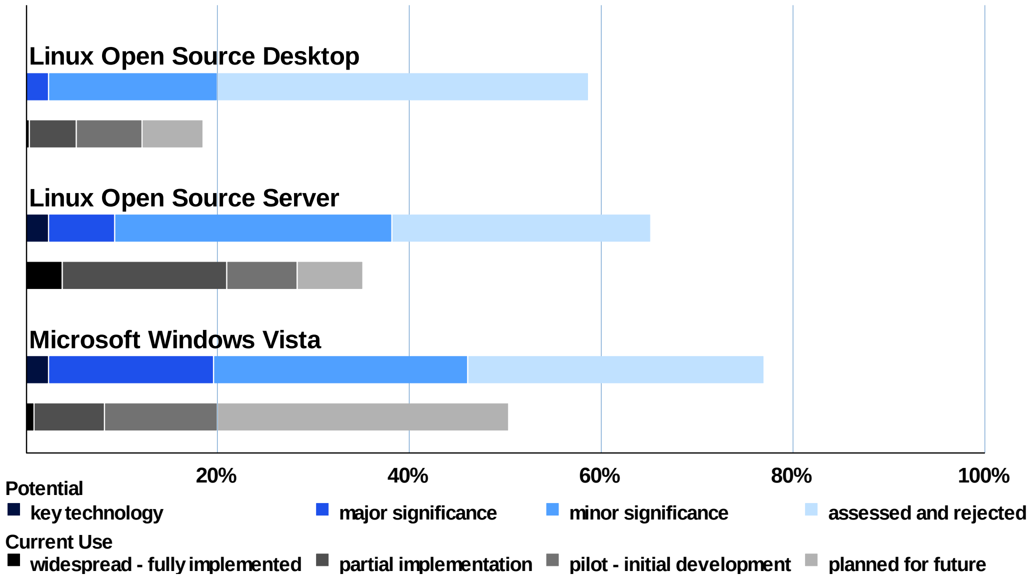
Potential and Current Use - Storage and Virtualisation



20% have fully implemented server virtualisation.
Just under 90% have plans to do so, few have rejected it
Over 70% see server virtualisation as a key technology or of major significance.

Survey 2008
strategic applications spending

Potential and Current Use - Operating Systems



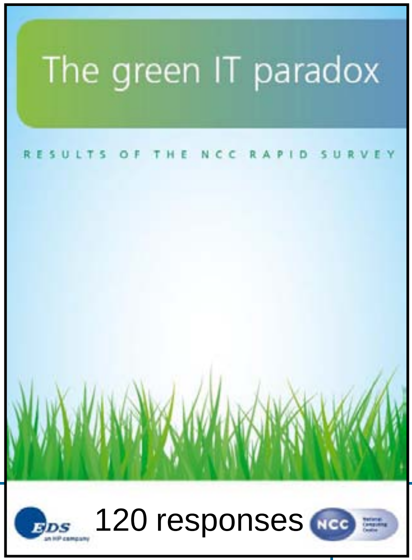
1% fully implemented Windows Vista, with a further 19% reporting some implementation.
30% plan to implement Vista in the future and 32% have assessed and rejected Windows Vista.

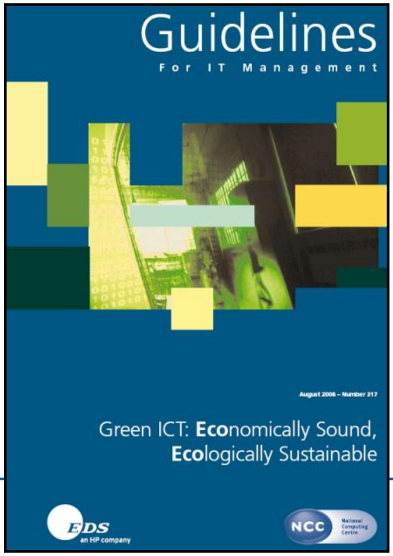
0% expect Linux Open Source Desktop to be a key technology, 2.6% expect it to be of major significance.
39% have assessed and rejected Linux Open Source Desktop.

Linux server environment is not expected to grow very rapidly, and is of only minor significance to most.

Survey 2008
strategic issues

- Most see environmental issues as *very to quite important* in comparison with other IT issues
- Only 15% have green policies w.r.t. IT
- Leaves 85% to help
- 80% think it *very to quite important* to get independent advice





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