Customer-centric IT
Enterprise IT trends and investment  2013
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The CIO KLUB, an initiative of the CIO Association, is one of the largest associations of Chief Information Officers (CIOs) in India. The Enterprise IT Trends and Investment Survey was initiated by the CIO KLUB in 2009 in association with Ernst & Young LLP (EYLLP). As we enter the fifth year of existence of the KLUB, it gives us immense pleasure to present the fifth annual survey report titled Enterprise IT trends and investment. This year, we have garnered a more representative response from all over India. At the same time, we have taken all possible confidentiality measures for the member responses, which were only accessed by the Ernst & Young LLP team for the aggregate survey analysis.

The objective of this survey is to provide insights on technology investment priorities to CIOs. We hope that CIOs will find the findings of the survey useful and use it as a tool to compare their respective sectors’ technology deployment trends, enabling them to keep their businesses ahead of times. We are sure that this survey will also serve as a benchmark for CIOs to internally justify the technology investment in their organizations. We hope that the survey proves to be valuable to the product vendors, system integrators and professional services firms so that they may understand this community’s IT spend plans for FY13-14.

Ernst & Young LLP, our knowledge partner, has assisted the CIO KLUB to prepare the relevant questionnaire, collate responses and analyze the responses. Being an independent professional services firm with wide experience in advisory, Ernst & Young LLP was uniquely positioned to provide this assistance. Undoubtedly, the CIO KLUB-EYLLP Enterprise IT trends and investment survey will be a useful and reliable document in the world of Indian Enterprise IT trends and investments.

We are glad to see the overwhelming participation of KLUB members. We hereby express our sincerest thanks to all the members for their support. We also express our sincere gratitude to the team from Ernst & Young LLP, which has been working on this initiative for the last three months.
The survey results show a drive to improve the customer’s satisfaction and increase IT’s visibility within the enterprise. However, concerns over policy and regulatory uncertainty, exchange rate volatility, rising costs and protectionist tendencies of the Government continue to affect the overall sentiment. This reflects in the IT spend plan for FY13-14. The conservative approach of the last three years continues in IT budgets this year.

The trend of enhancing customer experience and investing in technologies that allow businesses to be cost-effective and efficient is likely to continue in FY13-14. However, investments in the IT sector are not expected to be largely different than the previous years, after accounting for inflation and rising costs.

We are excited to present the results of the *Enterprise IT Trends and Investment Survey* 2013, insights into various IT initiatives taken by the CIOs and the proposed investment plans. It is our privilege to be associated with the CIO KLUB as knowledge partners for this survey. This survey aims to capture key IT priorities and initiatives taken by companies across various sectors. It also captures investment patterns, and their variations from previous years.

We would like to extend our warmest thanks to all participating CIOs for taking out time to share their views on IT investments and priorities. We are confident that you will find the survey report an interesting knowledge resource. We hope that it will be a valuable resource available to IT professionals and companies to understand the trends in India. We thank the CIO KLUB for providing us an opportunity to be a part of this, and reiterate our commitment to work together and jointly publish this report every year.
Introduction – customer centric IT

Improving the bottom line is the key focus of the CIOs in FY13-14

The current uncertainties about the policy and regulatory environment, and rising costs have made business leaders cautious in their investment plans. This has been reflected in the uncertainty in the priorities of the CIOs, as shown in our survey. IT spend increase will be restricted to address inflation and rising costs.

It is interesting to note how the CIOs’ priorities have changed to reflect changes in economic health indicators in the last five years of the survey. In 2009, cost reduction was a priority because the markets were declining sharply. In 2010, the mood was cautiously optimistic, with visible growth in the year to come. In 2011, in spite of slow down, the mood was optimistic and organizations planned to make large investments in IT. However, due to continued uncertain economic environment, the focus in 2012 shifted to create a lean, agile and resilient IT function.

This year the focus has shifted outward, and CIOs are looking at IT from the point of view of their businesses. This year’s survey has revealed that in FY13-14, CIOs are primarily focusing on improving the margins and the bottom line.

The global business community echoes this sentiment. Ernst & Young’s research with 641 senior executives in over 20 countries reveals risks and opportunities according to their importance for business. We have listed some of these risks and opportunities for companies based on their relevance to IT.
To address the risk around cost and price pressures and opportunities of market growth, in FY 13-14, the CIOs will focus on:

- Assisting a business in enhancing its customer experience by investing in customer-centric technologies to aid its growth
- Creating opportunities for internal customers and business stakeholders to improve operational efficiencies and be cost-effective
- IT-enabling the business operations by investing in various collaborative and transactional systems

The survey also highlights some interesting facts. In FY12-13 it had predicted a cautiously optimistic outlook for CIOs. However, a number of priorities indicated by CIOs for FY12-13 were deferred, and these have been now reflected as priorities for FY13-14. CIOs are expected to take up business continuity and information security initiatives in the current year. Both these priorities have been consistent features of our survey for the last four years.
Key findings and trends for 2013-14

The results of our survey indicate the following top priorities for CIOs for the year 2013-14:

- Being customer-centric and enhancing customer experience
- Transforming IT and automating business processes
- Building resilient IT to ensure business continuity
- Investing in enterprise mobility
- Investing in business intelligence to leverage information for decision making
- Securing the IT environment by investing in information security technologies

Apart from these priorities, the following broad trends have emerged for FY13-14:

- Median spend on IT as a percentage of revenue is 1.08 for manufacturing sectors and 3 for services sectors, such as banking and financial services, and technology.
- Innovation is expected to continue to drive capital investments. 81% of the respondents have confirmed this fact.
- IT spend is likely to remain consistent, as compared to prior years, and no major budget increase is anticipated.
- Balance of power is shifting to customers, as consumerization of technology gains momentum. CIOs are expected to work toward enhancing customer experience. Customer-centricity is closely linked to customer relationship management, social media and enterprise mobility.
- Cloud computing is likely to enable organizations to bridge the gap between consumerization of technology, high customer/employee expectations and the existing enterprise app world.
- The priority of business continuity has shifted toward smaller organizations with revenues less than INR10 billion.
- CIOs are likely to focus on enabling business processes and establishing efficient and effective business operations to improve profitability.
- Business intelligence, analytics, budgeting, planning, consolidation, business workflows and mobile-based applications are likely to drive the IT enablement agenda.
Survey questionnaire and analysis

The questions were designed to capture key aspects of IT priorities and sought very specific and objective responses from the participating CIOs. Questions were targeted at two broad areas e.g., IT budgets and investments, and technology trends for the coming year. The questions covered areas, such as key priorities for 2013-14, and investment rationale and spends on IT people, process, and technology. The survey also attempted to address aspects of the current IT operating model and the CIOs’ plans on enhancing the IT-enablement of business processes.

Though 276 responses were received, only 180 completed responses have been considered for the analysis. Partial responses were excluded from the analysis.

- CEO/ Board-level cockpit view of the business is likely to drive mobility evolution. Focus is expected to be to leverage information from unstructured data. Social media analytics is likely to gain momentum.

- Mobile Device Management (MDM) and Bring Your Own Device (BYOD) policies are likely to be the most important risk management measures.

- Protection from internal threats is expected to drive information security investments. Biometrics and other information security technologies used for protection against hacking have seen investments in the previous years, and have not found favor with respondent CIOs in the current year.

- Lack of an organization-wide data strategy, dashboards’ definitions, and supporting tools and technologies are major challenges that CIOs are expected to address in the current year to effectively leverage information for decision making.

- Majority of the IT functions continue to be performed in-house.
IT investments

IT spend allocation

Spend on IT as a percentage of revenue has largely remained consistent, as compared to previous years. The overall spend on IT for manufacturing sectors (such as chemicals, pharmaceuticals and life sciences, retail, consumer products, manufacturing, metals and mining) has a median value of 1.08% of the revenue. For services sectors (such as technology, banking and financial services, telecommunications) the median spend on IT is 3% of revenue.

Interestingly, the size of the organization did not have much of an impact on the spend percentages. This has been consistent across the size of the organizations of the survey respondents.

Figure 4: Median IT spend as a percentage of revenue

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<thead>
<tr>
<th>Manufacturing sectors</th>
<th>Services</th>
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<tr>
<td>1.08</td>
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Innovation continues to drive capital investments

Innovative solutions that give businesses a competitive edge have been a driving factor for IT for the last couple of years. The survey reveals the adoption of such solutions by the respondent CIOs in formulating their FY13-14 budgets. Along with innovation, ability to enhance customer experience has been another influencing factor that has helped respondent CIOs shape their IT budgets.
Ability of IT to quickly respond to business requirements is the single most influential factor for companies with revenues less than INR10 billion. Companies with revenues more than INR50 billion focus more on risk mitigation. Innovation and customer-centricity are common factors driving IT budgets in companies of all sizes.

**Sectoral view**

- Automotive sector respondents are likely to focus more on agility than on customer-centricity.
- The banking and financial services sector is expected to use risk mitigation as a primary driver for budget formulation.
- The infrastructure sector is expected to focus entirely on agility and quicker response in order to shape its budget.
- Retail, consumer products, real estate and construction, and pharmaceutical and life sciences sectors are likely to have a very high focus on innovation. Risk mitigation is likely to play a smaller role in determining investment priorities for the current year.
- The technology sector is expected to concentrate equally on agility and innovation in order to determine investment priorities for the current year.
IT investment is expected to largely remain constant, as compared to previous years

The current cautious business outlook has also impacted overall IT spend, which is expected to be similar to the previous year. Any increase is likely to be mainly due to inflationary increase in costs. The survey has revealed that the majority of the capex (capital expenditure) increase will be among companies with revenues less than INR50 billion. Companies with revenues more than INR50 billion are expected to witness similar capex as the previous year.

Figure 6: IT spend trend in the previous year

Sectoral view

- The automotive sector is not expected to witness high capital expenditure. 47% of the respondents from this sector expect the capex to decrease, as compared to the previous year. 33% expect it to remain constant.

- Similarly, the chemicals sector is also not expected to witness any increase in capital expenditure. 67% of the respondents from this sector expect the capex to be similar to the previous year, while 33% believe that it may decrease.
Technology, infrastructure and manufacturing sectors are expected to witness an increase in capital expenditure. However, businesses as usual costs are likely to largely remain consistent with the prior years.

The real estate and construction sector is expected to witness overall spend that was similar to the previous years.

Minority report

While most of the CIOs have voted to keep the IT spend similar to the previous year, respondents from some of the sectors have a different point of view. For instance, banking and financial services sector respondents expect increase in capital as well as 'business as usual' spend.

Similarly, pharmaceuticals and life sciences sector respondents have overwhelmingly voted to increase the capital and operational expenditure. 83% of the respondents have cited an increase in capital expenditure and 67% of the respondents have cited an increase in operational expenditure. In the previous year, this sector had adopted a very cautious approach.
The results of our survey indicate the following top priorities of the CIOs for the year 2013-14:

- Being customer-centric and enhancing customer experience by providing customers with easy and effective interface to collaborate with the business
- Transforming IT and enabling business processes to create efficient and effective business operations
- Building resiliency in IT to ensure business continuity
- Investing in enterprise mobility to provide flexibility to business personnel in executing business processes
- Investing in business intelligence to leverage structured and unstructured information for decision making
- Securing the IT environment by investing in information security technologies to protect the organization from internal or external threats.

**Figure 7: Top IT priorities for the year 2013-14**
Though CIOs have indicated an overwhelming response for customer-centricity, i.e., enhancing customer experience and enabling business processes, certain specific sectors have shown inclination toward other priorities, such as cloud, social media and enterprise IT architecture.

**Figure 8: The top IT priorities for FY 2013–14 by sector**

<table>
<thead>
<tr>
<th>Sector respondents in percentage</th>
<th>Overall</th>
<th>Automotive</th>
<th>Banking and financial services</th>
<th>Chemicals</th>
<th>Infrastructure</th>
<th>Pharmaceuticals and life sciences</th>
<th>Manufacturing</th>
<th>Real estate and construction</th>
<th>Retail and consumer products</th>
<th>Technology</th>
<th>Others</th>
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<tbody>
<tr>
<td>Customer centricity</td>
<td>8.33%</td>
<td>13.89%</td>
<td>3.33%</td>
<td>2.78%</td>
<td>6.67%</td>
<td>24.44%</td>
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**Minority report**

Majority of CIOs across sectors have identified consistent priorities. However, certain sectors have identified specific priorities. For instance, banking and financial services respondents do not believe transforming IT and enabling business processes to be a key priority for FY 13-14, considering the relative maturity of IT in this sector.

Furthermore, the automotive sector respondents have identified social media as a priority and are likely to leverage social media analytics to understand customer behavior and outpace the competition. Respondents from the retail and consumer products sector are expected to use social media for recruitment, acquiring new customers and brand recognition. These respondents also believe that cloud provides an apt solution to deploy customer-centric and employee life cycle applications. The manufacturing sector is also expected to focus on cloud solutions to deploy customer-centric and vendor collaboration applications.
Balance of power is shifting to customers as consumerization of technology gains momentum. CIOs will work toward enhancing customer experience.

The infrastructure sector respondents are likely to focus on cloud for deploying IT solutions as the respondents from this sector believe that cloud will help reduce hardware costs and optimize initial capital investments. The technology sector is also likely to evaluate cloud in order to deploy customer-centric applications. Infrastructure sector respondents are also expected to focus on outsourcing as a mechanism to gain access to skilled resources. Technology sector respondents are likely to focus on enterprise IT architecture in order to rationalize the IT systems portfolio and standardize IT services.

Customer-centric IT: enhancing customer experience and enabling business processes

Balance of power is shifting to customers as consumerizaton of technology gains momentum. CIOs will work toward enhancing customer experience.

Customer-centricity has been an overwhelming choice of participant CIOs as their first priority for FY13-14. All respondents across company sizes and sectors recognize this as a key priority. Respondents are expected to focus on enhancing customer experience with the organization — better user interface, quicker response, minimum time and maximum touch points for customers to interact with the organization.

Figure 9: Percent of respondents across sectors citing customer-centric applications as a priority
CIOs are expected to focus on enabling business processes and establishing efficient and effective business operations to improve profitability.

While CIOs generally focus on helping businesses improve the top line, current economic uncertainty has also led CIOs to look within and help businesses improve their bottom line. Improving effectiveness of the IT function mainly to enhance the experience of internal customers and IT-enable their requirements is another important agenda that is expected to occupy the CIOs’ mindshares. This has been on participant CIOs’ minds for the last three years. However, the focus is greater this year, with 52% of the respondents citing this as a priority, as compared to 42% in the previous year. Focus on improving IT is consistent across the size of the organizations and sectors.

Figure 10: Percent of respondents across sectors citing “improving IT function and process-effectiveness” as a priority

Enabling business processes is one key priority for respondents to help improve operational efficiencies. BI/DW/Analytics, budgeting, planning and consolidation, business and IT workflows, and mobile based applications are expected to drive the overall IT-enablement agenda.
Focus on customer-centricity is closely linked with customer relationship management, social media and enterprise mobility.

Figure 11: IT-enablement focus for FY13-14

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<tr>
<th>Sector respondents in percentage</th>
<th>Overall</th>
<th>Automotive</th>
<th>Banking financial services</th>
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<th>Pharmaceuticals and life sciences</th>
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<td>B2B applications</td>
<td>8.33%</td>
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Respondents from the automotive sector expect to focus on customer relationship management (CRM) and governance, risk and compliance (eGRC). However, they do not have plans to implement or evaluate mobile applications. This sector’s focus on CRM has emerged due to the current slowdown and focus of the organizations to retain existing customers and attract new ones. This sector also has mature supply chain management (SCM) processes.

Banking and financial services sector respondents are likely to focus on CRM as well as eGRC. Use of eGRC solutions is expected to be mainly in order to supplement the risk management and compliance initiatives in this highly regulated sector.

Respondents from the chemicals sector are expected to consider business-to-business (B2B) applications for collaborating better with vendors and customers, and focusing on enhancing supply chain capabilities. Apart from B2B, infrastructure
sector respondents are expected to focus on ERP and enabling employee life cycle (HR) processes. Respondents from the pharmaceutical and life sciences sector are likely to evaluate workflows as well as sector-specific applications and consider GRC applications for better risk and compliance management in response to strict legal and regulatory requirements.

Respondents from the manufacturing sector are likely to consider SCM to improve supply chain and CRM to attract and retain customers. Focus of real estate and construction sector respondents is expected to be mainly on enabling employee life cycle processes and core business processes, and enabling employees to interact using self-service portals. Retail and consumer products sector respondents are expected to focus on CRM and sector-specific applications. Finally, respondents from the technology sector are likely to focus on improving current enablement levels of employee life cycle processes.

**Business continuity: build resiliency to continue business operations during disruptions**

Priority balance has shifted in favor of smaller organizations that have revenues below INR10 billion.

Business continuity is one of the top five priorities for the CIOs. It has remained in their priority list since the inception of the survey. Larger organizations, with revenues greater than INR10 billion, have developed these continuity processes over the years and the priority balance has now shifted in the favor of organizations with revenues below INR10 billion. As compared to 55% of respondent in 2012, 70% of the respondents from smaller organizations have cited business continuity as a priority this year.

Figure 12: Percent of respondents across size of the organizations citing "business continuity" as a priority
Chemicals, pharmaceuticals and life science sector respondents have identified business continuity as one of their most important initiatives. As compared to 35% of the respondents of the previous year, 80% of the respondents from the pharmaceuticals and life sciences sector have identified business continuity as a key priority this year. Stricter regulatory requirements, focus on supply chain and an intention of building resiliency are key drivers for this sector to opt for business continuity.

Automotive sector respondents have continued to focus on business continuity. 53% of the respondents have identified business continuity as a priority, as compared to 71% respondents in the previous year. A number of companies have taken business continuity initiatives in the previous year and that is the main reason for the drop in the number of respondents (52% in the current year, as compared to 71% in the previous year, overall) citing this as a priority.

Respondents from the retail and consumer products sector have recognized business continuity as their priority, and 60% of the respondents have confirmed this.

Respondents from the technology, real estate and construction sectors have not identified business continuity as their priority. The technology sector has evolved and matured in business continuity programs mainly on account of managing customer expectations. Real estate and construction sector has decreased its focus on business continuity this year (25% of the respondents), as compared to the previous year (57% of the respondents). Rising construction costs and high level of inventory have driven this sector to focus more on its bottom line.

Effective business continuity management (BCM) has remained one of the top priorities on the corporate agenda. Big disasters and smaller disruptions have prompted leading executives to prepare for the worst by investing in effective business continuity management (BCM), with information security measures playing a key role.
Enterprise mobility: using mobile computing to enhance collaboration

The CEO cockpit view of the business is expected to drive mobility evolution. Enterprise mobility indicates a paradigm shift in the work habits of employees, where employees bring their own mobile device (BYOD) with corporate data available to them at any time and at any place. It is one of the key priorities for CIOs in FY13-14 and it is consistent across sectors.

Figure 14: Percent of respondents across sectors citing "enterprise mobility" as a priority

Enterprise mobility has been around for some time in the form of e-mail and collaboration tools. Currently, around 87% of the respondents are using this use case of enterprise mobility. Mobile applications deployment is expected to gain momentum in FY20-14. 62% of respondents are likely to implement, upgrade or evaluate mobile applications in the coming year.
More than 50% of the respondents have stated that their organizations have deployed CRM, sales force automation and video conferencing on mobile platforms. In FY13–14 key mobility deployments are expected to be seen for business intelligence dashboards, board level reporting, documentation management and sales force automation.
Mobile device management and BYOD policies are expected to be the most important risk management measures.

More than 35% of the respondents, who have either implemented or are evaluating enterprise mobility with BYOD, are expected to consider mobile device management (MDM) and network access control (NAC) technologies to protect corporate data and mitigate the risk of unauthorized disclosure. Key technologies that are to be considered to manage risks to corporate data due to enterprise mobility deployment in FY13-14 are:

- Implementing MDM to secure, monitor or manage mobile device deployments
- Implementing NAC to manage mobile device connectivity to corporate networks
- Implementing stricter information security policies around using BYOD
- Logging and monitoring mobile data usage
- Implementing endpoint malware protection to secure devices from malware threats

Figure 17: Top five BYOD end point risk management measures
However, more than 40% of the respondents believe that the flexibility or productivity gains using BYOD will come at a cost – device security, application security and backend integration costs will increase.

**Figure 18: Percent of respondents citing increase or decrease in IT spend due to BYOD**

Implementing BI dashboards on mobile devices has been acknowledged by more than 60% of the respondents and this use-case is consistent across sectors. However, respondents from pharmaceuticals and life sciences, and retail and consumer products sectors have cited implementing employee life cycle workflows as a quick-win initiative. Similarly, focus of using mobility for sales force automation and CRM is stronger in the banking and financial services, as compared to the other sectors.

Overall, 25% of the respondents across sectors do not intend to use BYOD. In case of the real estate and construction sector, two-third of the respondents are not expected to take BYOD initiatives.

Enterprise mobility will evolve over the next few years and organizations will expand mobility capabilities beyond e-mail and collaboration tools. Enterprise mobility will also play a key role in enhancing the customer (internal as well as external) experience. Organizations will also explore ways to secure corporate data residing in mobile devices, and solutions, such as MDM, will play a key role in enhancing security.
Business Intelligence: leverage information for decision-making

Business intelligence (BI) has been a consistent priority of all for the last four years. Number of respondents citing this priority has increased from 40% in the previous year to 51% in the current year. Business intelligence as a priority has been consistent across the size of the organizations.

Business intelligence enables business leaders to leverage information for decision-making and finding fact-based answers to specific questions. These fact-based answers are expected to be a key focus of BI implementation in current as well as subsequent years. Our interactions with select CIOs reveal that organizations strive to evaluate economic implications of actions, adjust to changing business environment, assess effectiveness of product or service launches, and identify and predict key business events and risks in a proactive manner.

Figure 19: Percent of respondents across sectors citing “business intelligence” as their priority

The survey also reveals that 43% of the respondents are expected to implement, upgrade or evaluate BI/DW/Analytic applications during the current year.
Though organizations are striving to attain maximum gain out of BI, a number of challenges have impacted the effectiveness of BI in meeting expectations. Key challenges, as cited by the respondents, are — lack of an organization-wide data strategy, lack of dashboard definitions and inadequate deployment of tools and technologies in order to meet the expectations.

Respondents from the retail and consumer products sector have not identified business intelligence as their sectoral priority, though 38% of the respondents from this sector are expected to upgrade their existing BI platforms. Effective BI is pivotal to the success of this sector, and 28% of the respondents have already implemented BI solutions. However, respondents from this sector have identified social media as a key priority. Social media analytics and Big Data are expected to drive the BI and analytics agenda of this sector. Respondents from the chemicals and technology sectors have not identified business intelligence as their key priority.

**Social media analytics**

Respondent CIOs across sectors are expected to start focusing on social media analytics to mine customer sentiment. In the years to come, social media is likely to play a pivotal role for organizations to understand the customer behavior.

**BI dashboards and enterprise mobility**

Deploying BI reports and dashboards on mobile devices for ease of access is another key element of using BI for effective decision-making. More than 60% of the respondents have stated that they will either implement or evaluate enterprise mobility for BI dashboards in FY13-14. Similarly, 49% of the respondents are expected to attempt to provide CEO and Board-level reports on mobile devices.
Making sense of unstructured data

Organizations are evaluating multiple options to make business intelligence and analytics relevant and leverage the information across multiple internal sources within the organization and external sources, including the web. Our interactions with CIOs have revealed the following focus areas:

- **Social media analytics**: This includes leveraging social media to identify customers, obtaining feedback regarding the products and services, and also tracking the effectiveness of campaigns. Furthermore, it also includes using this media to find out market potential and product positioning.

- **Big data**: Big data includes gaining competitive advantage out of a large volume of both structured and unstructured data from across different applications and data sources (internal and external), with an ability to acquire data faster and ensure speedier processing.

- **Advanced predictive analytics and prescriptive analytics**: This includes using statistical modeling techniques to simulate and predict business outcome based on the defined constraints.

- **In-memory analytics**: This includes enabling the user to process large volume of data at a very high speed as it stores and processes complex data processing rules within the main memory.

- **Self-service BI**: This includes designing and deploying a BI solution wherein end-users may perform analytics without involving technology or other support teams.

- **Cloud and analytics as a service**: This includes creating BI and analytics capability by leveraging infrastructure provided by the third party.

Information Security: protect corporate data from internal and external threats

Information security continues to remain a priority in the CIOs’ list. Irrespective of the size of the organizations, respondents continue to recognize the need to safeguard assets and secure data and information. It is interesting to note that information security has been gradually moved downward in the priority list. In 2009 and 2010, information security was voted as the second most important priority for CIOs. Since then, it has moved downward, but continues to feature in priority list. CIOs have cited a couple of reasons for this:

- Rationalization of IT budgets has led to deferment of planned investments in security

- Though organizations have matured information security programs, upcoming technology trends, such as cloud, social media and enterprise mobility continue to challenge these programs
The chemicals sector leads the information security bandwagon this year, and 66% of the respondents from this sector identified information security as their priority, as compared to 14% of the respondents citing security as their priority in the previous year’s survey. Most of the other sectors have been consistent in identifying security as their priority over the years.

Respondents from the retail and consumer products sector have preferred to focus on social media, cloud and enterprise mobility. However, they do not intend to invest in information security. Only 25% of the respondents from this sector have identified security as a priority. Information security may gain momentum in this sector when cloud, social media and mobility deployments gain maturity.

Figure 21: Percent of respondents across sectors citing “information security” as their priority

Key information security initiatives that are expected to be taken by organizations in the coming year are:

- Data leakage prevention (DLP)
- Digital/Information rights management (IRM)
- Security information and event management (SIEM)
- Single sign on (SSO)

Banking and financial services are expected to focus on identity and access management (IAM) to manage access across multiple and diverse applications prevalent in this sector. Information security has matured over the years and the basic building blocks such as firewall, end point security and intrusion detection/prevention systems have been in use for a while. More than 65% of the respondents from this sector have cited existing use of these technologies. Among other technologies, network access control and biometrics are not likely to witness major investments in the coming year.
Protection from internal threats are likely to drive information security investments

The survey reveals that organizations have already taken steps to address external threats, such as hacking. Firewalls, IDS, content filtering, vulnerabilities management technologies are not in contention for FY13-14. Similarly, biometrics has not found favor among respondent CIOs.

The information security investment focus for FY13-14 is expected to be on the following:

- Data leakage prevention to protect sensitive data
- Information rights management to restrict access to sensitive data
- Security information and event management (SIEM) to log and monitor corporate data access
- Single sign-on for managing access to IT systems

Figure 22: Information security focus technologies for FY13-14

<table>
<thead>
<tr>
<th>Sector respondents in percentage</th>
<th>Overall</th>
<th>Automotive</th>
<th>Banking and financial service</th>
<th>Chemicals</th>
<th>Infrastructure</th>
<th>Pharmaceuticals and life science</th>
<th>Manufacturing</th>
<th>Real estate and construction</th>
<th>Retail and consumer products</th>
<th>Technology</th>
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<td>Internal threats</td>
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<td>Single sign-on</td>
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<td>Content filtering/inspection</td>
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</table>
Data leakage prevention (DLP)
Respondents across sectors are expected to focus on DLP technologies to address the information leakage concerns. Current deployment of DLP is low in most sectors. However, focus on DLP is likely to be more in organizations with revenues greater than INR10 billion, as compared to smaller organizations.

Information rights management (IRM)
IRM, used to restrict access and usage of electronic content, is likely to witness increased focus. This focus is evident in the organizations with revenues greater than INR10 billion. Though only 17% of the respondents have cited using IRM, 43% of the respondents are expected to implement or evaluate deployment of IRM. It is no surprise that focus on IRM is largely in the automotive, pharmaceuticals and life sciences sectors as organizations in these sectors make substantial investment in research and development. More than 75% of the respondents from these sectors are likely to evaluate IRM in the current year.

Security information and event management (SIEM)
SIEM, a tool used for centralize storage and interpretation of logs, is one of the top security priorities for the current year. Respondents from the automotive, pharmaceuticals and life sciences and technology sectors are likely to lead the SIEM implementation in the current year.

Single sign on (SSO)
SSO has been another talking point for CIOs over the last few years. While single sign on is expected to reduce administrative overhead or password fatigue, it also calls for increased focus on protection of user credentials. Banking and financial services, chemicals, manufacturing, and pharmaceuticals and life sciences sectors are expected to focus more on SSO this year.
Cloud computing

Cloud is expected to bridge the gap between consumerization of technology, balance of power in hands of consumers and the traditional enterprise app world.

More and more businesses are moving into a virtual world, supported by new technologies and driven by a need to lower their IT infrastructure and administrative costs and adopt a flexible and scalable model for IT. While adoptions of cloud services have gained impetus, the progress is still slow. This is not surprising, as the number of risks and challenges identified by respondents have remained fairly consistent over the years. Data security and lack of control in the IT environment are the key concerns of CIOs. Like any transformational initiative, adoption of cloud also faces internal resistance as turning over control of the security of their IT infrastructure and data is an inherently uncomfortable situation for any senior corporate manager. Another decisive factor for the slow progress of cloud computing, as cited by CIOs, is increased bandwidth and network costs that compensate for savings in internal infrastructure costs.

Figure 23: What will drive cloud adoption in FY13-14?
Sector view of cloud services provides interesting viewpoints. The adoption of cloud solution for hosting e-mail services and customer-centric applications top the list, with respondent from across the sector suggesting usage of cloud services for these services. Respondents from the automotive, infrastructure, banking and financial services sectors have suggested adoption of cloud for employee self-service workflows (travel, expense, etc.). Cloud-based disaster recovery is another use case that respondents are expected to evaluate this year. The analysis of the survey highlights the fact that respondents across the sectors are still apprehensive to adopt cloud for core business applications, such as Enterprise Resource Planning (ERP) or Human Resource Management System (HRMS).

Ernst & Young LLP believes that cloud services will finally take off in the near future because of technology advances, particularly ubiquitous high-speed internet connectivity, the ever decreasing cost of storage and maturity in the cloud governance model.

**Figure 24: Potential cloud adoption opportunities in order of preference**

<table>
<thead>
<tr>
<th>Preference</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>E-mail</td>
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<tr>
<td>02</td>
<td>Customer-centric applications</td>
</tr>
<tr>
<td>03</td>
<td>Disaster recovery</td>
</tr>
<tr>
<td>04</td>
<td>HRMS/ employee life cycle</td>
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<tr>
<td>05</td>
<td>Vendor collaboration applications</td>
</tr>
<tr>
<td>06</td>
<td>Employee self service portals and workflows</td>
</tr>
<tr>
<td>07</td>
<td>Business intelligence and analytics</td>
</tr>
<tr>
<td>08</td>
<td>Intranet</td>
</tr>
<tr>
<td>09</td>
<td>Core ERP applications</td>
</tr>
</tbody>
</table>

**Social media analytics**

Social media is a rapidly evolving platform that shares and amplifies individual opinion and can create strategic opportunities or unforeseen risks for companies. As its popularity grows, organizations are becoming increasingly aware of the importance of social media insight while making critical decisions or avoiding significant pitfalls.

While organizations face the challenge of maintaining control of their identity, they also struggle with incorporating meaningful opinions into their decision making and risk management processes. This can be achieved by means of social media analytics, which is the practice of gathering data from blogs and social media websites and analyzing that data to make business decisions. The most common use of social media analytics is to mine customer sentiment to support marketing
and customer service activities. Typical objectives include increasing revenues, reducing customer service costs, getting feedback on products and services, and improving public opinion of a particular product or services.

Respondents across the sectors have expressed very similar sentiments on social media analytics. The potential driver for social media analytics identified by most of the respondents includes creating brand recognition, understanding the customer behavior and acquiring new customers. The need for social media analytics has been gaining prominence across sectors. However, it is interesting to note that the infrastructure sector leads the pack in this respect. Respondents from this sector have suggested the use of social media analytics to understand customer requirements and behavior protect oneself against risk and reorganize the brand. The survey also reveals that respondents from the pharmaceuticals and life sciences sector have been evaluating social media analytics in order to monitor adverse events, while respondents from the retail and consumer products sector have been using social media analytics to recruit staff.

"Consumerization of technology and technology-savvy customers are expected to make social media analytics a cornerstone of the organizations’ business intelligence and analytics efforts."

**Figure 25: Potential drivers for social media analytics**

<table>
<thead>
<tr>
<th>Preference</th>
<th>Drivers for social media</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Brand recognition</td>
</tr>
<tr>
<td>02</td>
<td>Understanding customer behavior</td>
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<tr>
<td>03</td>
<td>Acquiring new customers</td>
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<tr>
<td>04</td>
<td>Understanding the customer requirements</td>
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<tr>
<td>05</td>
<td>Efficient and effective recruitment</td>
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<tr>
<td>06</td>
<td>Protecting against risks</td>
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<tr>
<td>07</td>
<td>Outpacing the competition</td>
</tr>
<tr>
<td>08</td>
<td>Educating the customers</td>
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<tr>
<td>09</td>
<td>Monitoring adverse events</td>
</tr>
</tbody>
</table>
A note on outsourcing

Outsourcing

Outsourcing has been an alternative many respondents have chosen to gain access to skilled resources and improve operational efficiencies. However, the survey reveals that respondents still largely prefer to retain majority of their IT functions in-house, with the exception of audits, which require skilled manpower and is mostly outsourced.

Figure 26: The status of outsourcing

- Currently in-house
- Currently outsourced
Approach

Ernst & Young LLP and CIOKLUB’s fifth Enterprise IT Trends and Investment Survey, brought to you by Ernst & Young LLP on behalf of the CIOKLUB, gauges the current investment patterns, IT priorities and upcoming investment plans of the companies.

This year’s survey was conducted from 25 February 2013 to 18 March 2013. More than 260 CIOs from various companies across major industries participated in the survey.

The questionnaire used in this survey was designed to gather relevant information about IT investments, initiatives, priorities and technologies domains.

This survey was conducted through a secure online tool with a specific URL that was mailed to designated members of the CIOKLUB, along with instructions for completing the survey. Personal interviews were conducted with a few CIOs to obtain their response and perspective on IT initiatives.

Ernst & Young LLP downloaded the results of the survey to conduct an analysis and used cross tabs to identify the patterns of various IT domains across specific industries, and the size and type of industry. Responses of 180 out of the 260 respondents, who completed the survey were considered as complete and used for the analysis. Partial responses have been ignored for the purpose of this analysis.
Profiles of 2013 survey participants

Figure 27: Survey participants by sector

- Automotive
- Banking and financial services
- Chemicals
- Government, public sector and non-profit
- Infrastructure
- Pharmaceuticals and life sciences
- Manufacturing
- Metals and mining
- Media and entertainment
- Professional services
- Real estate and construction
- Retail and consumer products
- Technology
- Telecommunications
- Transportation and logistics
- Utilities
- Others

Figure 28: Survey participants by size of the organization (in INR)

- < 5 billion
- 5 billion - 10 billion
- 10 billion - 50 billion
- 50 billion - 100 billion
- > 100 billion
- No response
About CIO KLUB

CIOs of Indian enterprises have formed the CIO KLUB, which is registered under the name of CIO Association. CIO Association (CIO KLUB) is a non-profit organization and the largest association of chief information officers in India. The CIO KLUB is governed by a Governing Body and a National Executive Council, and each chapter has a managing committee to oversee the CIO KLUB objective on a national level.

Being true to its DNA, CIO KLUB touches all aspects of the life of CIOs.

CIO KLUB has grown truly national with six working chapters in India’s most strategic cities (Mumbai, Delhi, Bangalore, Pune, Chennai and Coimbatore). From a humble beginning in Mumbai on 25 April 2008 with less than 30 members, it has now grown to have 950 members across India.

The key objectives of the of the KLUB are to share experience, enhance knowledge and explore business solutions by leveraging the collective wisdom of a large number of CIOs, who are registered members of the Klub, and senior technology executives of the country. The current registered members represent manufacturing, BFSI, Service, Pharma and Healthcare, Retail, Real Estate & Construction sectors from India’s leading business houses and PSUs covering a wide spectrum of Indian businesses. With such leadership as members, CIO KLUB is uniquely positioned to be the voice of the community of IT users in the country. We have formed various working groups, including one to especially interact with the Government in order to support the Government initiative of deploying information technology in Government projects. This is a social initiative of CIO KLUB, where it offers the services of a large number of experienced CIOs, who have implemented various IT projects in private enterprises.

The CIO KLUB is unique in providing an interactive platform for vendors, media and CIOs so that they may exchange best practices and ideas and formulate strategies to address common IT issues. The KLUB’s objective is to share and enhance knowledge. In order to achieve these, CIO KLUB organizes various knowledge-sharing sessions across the country.

The primary objective of these sessions is to increase the business benefits of the organizations of member CIOs and also to help them grow as effective leaders in their professional lives. The KLUB also encourages entrepreneurial spirit by providing a platform for sharing and generating innovative ideas in the larger interest of the community.

For more information about CIO KLUB, please visit www.cioskub.com or email us at cioklub@cioklub.com.
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