2019 IT Priorities – Middle East

January 2019
2019 IT Priorities Survey

What is the big picture?

- **Budgets and optimism are very strong for 2019**
- Having not been affected as much by GDPR, the regional focus is on security with 41% of companies increase spend on it in 2019, mostly on cybersecurity and risk management [and within the data center!]
- Similar to Europe, cloud management and services leads the way throughout the buying process, in all topics
- Unlike Europe, Digital transformation is still very much at its infancy; however, still has strong buying power
- Windows 10 migration still low; big spend in 2019
Broad Initiatives
Which of these broad initiatives will your company implement in 2019?

IT automation: 33%
Cybersecurity or risk management: 30%
Artificial intelligence/machine learning: 29%
BI/analytics: 28%
End-user computing projects: 28%
Mobile development: 25%
Internet of Things: 24%
Business applications: 22%
Cloud infrastructure deployment or migration: 21%
Big data platform/data warehouse/data lake: 20%
DevOps: 17%
Blockchain: 14%
Edge computing: 13%
High-performance computing: 13%
Software-defined data center technologies: 11%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 151
Budget Changes
How do you expect your 2019 budget for information technology to differ from your 2018 budget?

- 13% expect it to decrease
- 15% expect no change
- 72% expect it to increase

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 137
Which areas will your budget increase in? (Choose all that apply)

- Security/risk management: 41%
- Software: 35%
- Cloud services: 34%
- Managed services: 33%
- Staff: 33%
- Backup/disaster recovery: 30%
- Networking: 29%
- Maintenance/support: 27%
- Storage, on-premises: 23%
- Consulting services: 22%
- Servers, on-premises: 20%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 86
Application Software
Which of the following best describes what the type of software initiative you plan to deploy in 2019?

- Application integration: 57%
- Bus apps (ERP, CRM, HR, financial software): 43%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 135
Which of the following applications are you most likely to deploy in the cloud (software as a service) in 2019? (Choose all that apply)

- CRM and sales management: 30%
- ERP: 30%
- BI/analytics: 28%
- Database: 22%
- Big data platform/data warehouse/data lake: 19%
- Finance/accounting: 19%
- Machine learning platform: 18%
- Business process management: 17%
- Data quality: 17%
- HR/HCM: 17%
- Supply chain management: 17%
- Enterprise content management: 16%
- Customer experience management: 15%
- Data science platform: 9%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 89
Which of the following best describes the elements within your IT environment you plan to monitor? (Choose all that apply)

- Application performance: 41%
- User behavior: 37%
- Network traffic/flow data: 34%
- Network performance: 32%
- Log files: 32%
- Identity and access controls: 30%
- Infrastructure (incl. systems, servers, AIOps): 28%
- User experience/adoptions: 28%
- Endpoints/devices (incl. IoT): 23%
- Cloud apps/workloads: 19%
- Cloud provider SLAs: 15%
- DevOps-enabled environment: 10%
- Synthetic website: 5%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 155
Which of the following deployment models will your company use in 2019? (Choose all that apply)

- Mobile: 44%
- Software as a service (cloud application): 34%
- On-premises software/hardware: 29%
- Platform as a Service: 25%
- Hybrid cloud: 21%
- Infrastructure as a Service: 21%
- On-premises appliance: 21%
- Multicloud: 10%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 73
Which of the following information management initiatives will your company deploy in 2019? (Choose all that apply)

- Data governance: 36%
- Data integration: 26%
- Data visualization: 25%
- Machine learning platform: 25%
- Big data platform/data warehouse/data lake: 24%
- Enterprise reporting/self-service BI: 24%
- Predictive analytics: 20%
- Data quality: 19%
- Real-time/streaming analytics: 19%
- Data preparation: 16%
- Operational database management systems: 15%
- Relational database management systems: 13%
- Data science platform: 13%
- SQL on Hadoop engine: 12%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 104
Which of the following software development-related initiatives will your company deploy in 2019? (Choose all that apply)

- Business process automation: 28%
- Web app development/progressive web apps: 26%
- DevOps: 23%
- Agile project management software: 21%
- Continuous testing: 21%
- Mobile app development platform: 21%
- Configuration management: 16%
- Container management: 16%
- Infrastructure-as-a-Service: 16%
- Microservices: 16%
- API management: 15%
- Application modernization: 15%
- Container orchestration: 15%
- Develop Internet of Things applications: 15%
- Private cloud and virtualized systems management: 15%
- Monitoring software: 14%
- DevSecOps: 13%
- Blockchain development: 12%
- Infrastructure orchestration and automation: 12%
- Platform as a Service: 12%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 86
Application Integration
Which of the following software app integration initiatives will your company deploy in 2019? (Choose all that apply)

- Business process automation: 64%
- API management: 34%
- Robotic process automation: 28%
- B2B integration (EDI): 25%
- Integration platform as a service: 23%
- Enterprise service bus: 17%
- Publish/subscribe messaging system: 13%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 53
Which of the following business applications will you implement or upgrade in 2019? (Choose all that apply)

<table>
<thead>
<tr>
<th>Application</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERP</td>
<td>56%</td>
</tr>
<tr>
<td>CRM and sales management</td>
<td>29%</td>
</tr>
<tr>
<td>Finance/accounting</td>
<td>24%</td>
</tr>
<tr>
<td>Sales analytics</td>
<td>22%</td>
</tr>
<tr>
<td>Marketing automation</td>
<td>20%</td>
</tr>
<tr>
<td>Customer service</td>
<td>18%</td>
</tr>
<tr>
<td>Manufacturing management</td>
<td>18%</td>
</tr>
<tr>
<td>Business process management</td>
<td>16%</td>
</tr>
<tr>
<td>Customer experience management</td>
<td>16%</td>
</tr>
<tr>
<td>Internet of Things applications</td>
<td>16%</td>
</tr>
<tr>
<td>Supply chain management</td>
<td>16%</td>
</tr>
<tr>
<td>Contact center/call center management</td>
<td>13%</td>
</tr>
<tr>
<td>HR/HCM</td>
<td>13%</td>
</tr>
<tr>
<td>Procurement</td>
<td>13%</td>
</tr>
<tr>
<td>Web content management</td>
<td>13%</td>
</tr>
<tr>
<td>Enterprise content management</td>
<td>11%</td>
</tr>
<tr>
<td>Social media monitoring/listening</td>
<td>11%</td>
</tr>
<tr>
<td>Marketing analytics</td>
<td>9%</td>
</tr>
<tr>
<td>E-commerce</td>
<td>7%</td>
</tr>
<tr>
<td>Talent management</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 45
Compute Capacity
How do you expect your total compute capacity to change in the following categories in the next 12 months?

- Composable infrastructure: 1% decrease, 7% increase
- Public cloud infrastructure-as-a-service (IaaS): 1% decrease, 6% stay the same, 16% increase
- Hyperconverged infrastructure: 1% decrease, 6% stay the same, 15% increase
- Platform-as-a-service (PaaS): 3% decrease, 2% stay the same, 11% increase
- Managed hosting: 3% decrease, 6% stay the same, 15% increase
- Colocation: 3% decrease, 5% stay the same, 8% increase
- Converged infrastructure: 2% decrease, 9% stay the same, 9% increase
- Bare metal platforms: 5% decrease, 3% stay the same, 6% increase
- Stand-alone x86 servers: 16% decrease, 10% stay the same, 16% increase
- Stand-alone non-x86 servers: 9% decrease, 7% stay the same, 3% increase

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 88
Which of the following does your company use in production?

- Stand-alone x86 servers: 38%
- Managed hosting: 29%
- Hyperconverged infrastructure: 23%
- Public cloud infrastructure-as-a-service: 23%
- Converged infrastructure: 21%
- Platform as a Service: 21%
- Stand-alone non-x86 servers: 21%
- Colocation: 16%
- Bare metal platforms: 15%
- Composable infrastructure: 9%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 101
Which of the following best describes the elements within your IT environment you plan to monitor? (Choose all that apply)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network performance</td>
<td>55%</td>
</tr>
<tr>
<td>Network traffic/flow data</td>
<td>45%</td>
</tr>
<tr>
<td>Application performance</td>
<td>43%</td>
</tr>
<tr>
<td>Log files</td>
<td>37%</td>
</tr>
<tr>
<td>Identity and access controls</td>
<td>32%</td>
</tr>
<tr>
<td>Infrastructure (incl. systems, servers, AIOps)</td>
<td>29%</td>
</tr>
<tr>
<td>User behavior</td>
<td>27%</td>
</tr>
<tr>
<td>Endpoints/devices (incl. IoT)</td>
<td>26%</td>
</tr>
<tr>
<td>User experience/adoption</td>
<td>20%</td>
</tr>
<tr>
<td>Cloud apps/workloads</td>
<td>16%</td>
</tr>
<tr>
<td>Cloud provider SLAs</td>
<td>12%</td>
</tr>
<tr>
<td>DevOps-enabled environment</td>
<td>9%</td>
</tr>
<tr>
<td>Synthetic website</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 92
Which of the following data center projects will you deploy in 2019? (Choose all that apply)

- Security risk and vulnerability management: 44%
- Windows Server 2016 migration: 33%
- Private cloud creation: 27%
- Intelligent workload management: 26%
- Server refresh: 23%
- Windows Server 2012 migration: 21%
- Microsegmentation: 18%
- Hyperscale infrastructure: 13%
- Edge computing: 12%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 78
Which of the following data center technologies or services will you deploy in 2019? (Choose all that apply)

- Server virtualization: 45%
- IT service management: 34%
- Managed private cloud services: 24%
- Linux OS: 23%
- System management: 23%
- Cloud monitoring: 20%
- Artificial intelligence/machine learning: 17%
- Monitoring software: 17%
- System automation: 17%
- Configuration management software: 16%
- Hyperconverged infrastructure: 16%
- Cloud automation: 14%
- Blockchain: 11%
- Serverless computing: 10%
- Container management software: 9%
- Converged infrastructure: 9%
- Public cloud IaaS capacity: 9%
- Cloud orchestration: 7%
- Colocation services: 7%
- Composable infrastructure: 6%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 87
Desktop Virtualization
Which of these desktop projects will your company do in 2019? (Choose all that apply)

- Windows 10 deployment/migration: 40%
- Application virtualization: 34%
- Virtual desktop infrastructure (VDI): 34%
- Desktop performance monitoring: 27%
- Identity management: 27%
- Desktop-as-a-Service: 23%
- User profile management: 23%
- Office suites, EFSS, and other productivity apps: 21%
- Thin clients/zero clients: 19%
- Unified endpoint management: 16%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 101
Digital Transformation
Regarding digital transformation efforts in your organization, please indicate your level of progress/maturity today

- Starting digital transformation: 45%
- Fundamental digital transformation: 33%
- Have not started digital transformation yet: 21%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 84
What are the primary drivers of your company’s digital transformation initiatives? (Choose all that apply)

- Streamline operations, internal efficiency and process management: 51%
- Improve employee performance and productivity: 47%
- Addressing compliance and security requirements: 42%
- Enhancing product or service innovation: 40%
- Enhance customer experience and brand loyalty: 32%
- Accelerating time to market: 31%
- Enhanced customer insights: 31%
- Decreasing skills gap/acquiring new talent: 21%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 109
Which of the following activities is your organization implementing to support digital transformation? (Choose all that apply)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase investment in technologies that improve employee experience and productivity</td>
<td>41%</td>
</tr>
<tr>
<td>Refresh/upgrade on-premises IT infrastructure</td>
<td>39%</td>
</tr>
<tr>
<td>Modernize legacy applications</td>
<td>35%</td>
</tr>
<tr>
<td>Increase investment in security to address new threats and compliance/regulatory requirements</td>
<td>27%</td>
</tr>
<tr>
<td>Increase the speed/volume of new app development/delivery</td>
<td>27%</td>
</tr>
<tr>
<td>Increase utilization of cloud services</td>
<td>25%</td>
</tr>
<tr>
<td>Restructure staff</td>
<td>21%</td>
</tr>
<tr>
<td>Increase utilization of automation and artificial intelligence</td>
<td>19%</td>
</tr>
<tr>
<td>Upgrade/invest in sales and marketing technologies to enhance customer experience</td>
<td>13%</td>
</tr>
<tr>
<td>Break down data silos within the organization</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 113
Which of these managed service initiatives will your company implement in 2019? (Choose all that apply)

- IT service management: 33%
- Network infrastructure and management: 28%
- Mobile device management: 26%
- Backup/archive/DR/business continuity: 25%
- IT strategy, architecture and planning: 25%
- Systems management and monitoring: 22%
- Managed security services: 21%
- IoT management: 21%
- Machine learning as a service: 20%
- End-user computing: 15%
- Server-based computing: 15%
- Big data as a service: 13%
- Managed detection & response: 11%
- Primary storage: 10%
- Enterprise service management: 9%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 140
Networking and Mobility
Which of these networking initiatives will your company implement in 2019? (Choose all that apply)

- Network management and monitoring (on-prem): 28%
- IP address management & monitoring (DNS/DHCP): 21%
- Network analytics: 21%
- VoIP: 20%
- Network management and monitoring (cloud): 19%
- Managed network services: 18%
- VPN/NAC: 18%
- Web conferencing: 18%
- Internet of Things infrastructure: 17%
- Network virtualization: 17%
- Video conferencing: 17%
- Incident management (NetOps): 15%
- Unified communications applications/platforms: 14%
- Upgrade or improve cloud connectivity: 14%
- WLAN infrastructure: 13%
- WLAN management tools (on-premises): 13%
- Data center fabric: 12%
- WAN services: 12%
- Campus LAN (wired or wireless): 11%
- Converged storage and data center network: 11%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 109
Which of these mobility projects will your company do in 2019? (Choose all that apply)

- Implement EMM, MDM, and MAM: 32%
- Expand enterprise mobility management to other devices: 30%
- Identity management, SSO, or multi-factor authentication: 29%
- Mobile-enabling existing business processes: 27%
- Mobile app development platform: 24%
- Mobile app monitoring and analytics: 18%
- Low code development platform: 10%
- Mobile back end as a service: 8%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 84
Security
Which of the following best describes the elements within your IT environment you plan to monitor? (Choose all that apply)

- Network performance: 48%
- Network traffic/flow data: 45%
- Identity and access controls: 40%
- User behavior: 39%
- Log files: 38%
- Application performance: 36%
- Infrastructure (incl. systems, servers, AIOps): 33%
- Endpoints/devices (incl. IoT): 29%
- User experience/ adoption: 23%
- Cloud apps/workloads: 17%
- Cloud provider SLAs: 13%
- DevOps-enabled environment: 11%
- Synthetic website: 7%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 122
Which of these security initiatives will your company implement in 2019? (Choose all that apply)

- Data loss prevention: 27%
- SIEM: 26%
- Vulnerability management: 26%
- Email security: 25%
- Endpoint security: 25%
- Next-generation firewalls: 22%
- Fraud detection systems: 21%
- Web security: 21%
- Application security: 21%
- Encryption: 21%
- End-user security training: 21%
- Identity and access management: 21%
- Network traffic analytics: 21%
- Threat detection/management: 21%
- VPN/NAC: 19%
- Access management: 18%
- Cloud security services: 17%
- Security analytics: 17%
- Single sign-on: 17%
- Advanced threats and deep packet inspection: 17%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 121
What is the total number of endpoints within your organization (including IoT devices)?

- Less than 750: 43%
- 750 to 6,000: 26%
- 5,001 to 20,000: 11%
- 20,001 to 50,000: 5%
- 50,001 to 100,000: 8%
- 100,001 to 500,000: 4%
- More than 500,000: 3%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 115
Which of these primary storage initiatives will your company deploy in 2019? (Choose all that apply)

- SAN: 24%
- NAS: 22%
- Hyper-converged infrastructure: 20%
- Storage for virtual environments: 17%
- Storage for big data analysis: 15%
- Cloud object storage: 14%
- Data management: 13%
- Storage virtualization: 13%
- All-flash arrays: 12%
- Hybrid storage arrays: 12%
- Implement/expand Ethernet storage network: 12%
- Converged infrastructure: 11%
- Open-source storage technologies: 10%
- Private enterprise cloud storage: 10%
- Public cloud storage: 10%
- Software-defined storage: 10%
- Implement/expand Fibre Channel storage network: 9%
- Managed storage services: 9%
- On-premises object storage: 9%
- Storage for containers: 9%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 93
Which of these secondary storage initiatives will your company deploy in 2019? (Choose all that apply)

- Data archiving: 34%
- Backup for virtual servers: 31%
- Backup software: 27%
- Cloud backup as a service: 25%
- Managed backup/archive/DR/business continuity solutions: 23%
- On-premises DR and business continuity: 23%
- Backup hardware: 19%
- Data management: 15%
- Endpoint backup: 15%
- Application-specific backup: 14%
- Outsourced/cloud-based DR/business continuity: 14%
- Integrated backup appliance: 13%
- Hyperconverged infrastructure for secondary storage: 7%
- New tape technologies: 7%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 88
Including primary and secondary storage, approximately how much storage capacity does your organization maintain on-premises?

- Less than 10 Terabytes (TB): 25%
- 10 TB to 99 TB: 38%
- 100 TB to 249 TB: 9%
- 250 TB to 499 TB: 5%
- 500 TB to 999 TB: 8%
- 1 Petabyte to 5 Petabytes (PB): 6%
- 6 PB to 9 PB: 1%
- 10 or more Petabytes: 4%

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 98
How much primary and secondary storage, including for backup and disaster recovery, does your organisation have stored off-premises in cloud storage services.

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 59
Demographics

Company Sizes (number of employees)

- 5,000+ 18%
- 1,000 to 4,999 21%
- 100 to 999 37%
- <100 24%

Job Functions

- IT Staff 30%
- Mid-Level IT Manager 28%
- Director/Snr IT Manager 13%
- Non IT Staff 11%
- Analyst 6%
- CIO/CTO/VP 6%
- Architect 4%

Top Industries

1. Education
2. Financial/Banking/Insurance/Real Estate/Legal
3. Retail
4. Banking
5. Education Management

reported their annual organizational revenue is over €10 million

Source: TechTarget | IT Priorities Survey 2019 | Middle East | n = 319
Thank you.