ICT investment trends in Brazil

Enterprise ICT spending patterns through to the end of 2016

May 2015
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Brazilian enterprises’ ICT budgets are set to increase considerably in 2015.

Despite the uncertain economic conditions

... (Summary of the situation in the enterprise ICT market and discussion around the degree to which IT budgets are decreasing/increasing/staying flat.)

How did your ICT budget grow or shrink from 2013-14, and has it changed from 2014-15?

- Decrease 6% or more
- Decrease slightly (1%-5%)
- Flat (0%)
- Increase slightly (1%-5%)
- Increase significantly (6%+)

% of respondents
Investment in hardware and software remains the highest priority among Brazilian enterprises

Kable’s survey suggests that Brazilian enterprises are allocating a major portion of their IT budgets on

(A brief description of the way in which enterprises are allocating their IT budgets.)
Expenditure on clients constitutes a major chunk of Brazilian enterprises’ hardware expenditure

What proportion of your hardware budget was spent in the following areas in 2014?

- Processors X%
- Infrastructure as a service X%
- Mainframes X%
- Storage X%
- Peripherals X%
- Security X%
- Network and communications equipment X%
- Servers X%
- Clients X%

X respondents

Kable’s recent survey finds that almost one third of the hardware spend is on .......................................................... (A brief description on where the investments are being made and what the implications are for hardware vendors.)
HR management and financial solutions are the most sought after applications among Brazilian enterprises.

The demand for enterprise applications is growing in Brazil; such solutions enable enterprises to manage their operations more effectively by providing ................. (Briefly describe in which sub categories enterprises are planning on making investments).
IBM leads the list of enterprise applications vendors among Brazilian enterprises

In terms of vendor satisfaction, IBM, which has been selected by X% of respondents as their primary provider, gets an average rating of X, on a scale of one to four .......(Briefly describe the top providers for specific technology and satisfaction rating relating to that vendor).
Raising efficiency and using IT to support revenue growth are the most important business and IT objectives influencing IT investment strategy.

- A majority of Brazilian enterprises rate raising efficiency as their most important business objective.
- A majority of Brazilian enterprises rate using IT to support revenue growth as their most important IT objective.

Please rate the importance of the following business objectives in influencing your IT investment strategy in 2014:

- Raise efficiency
- Increase customer satisfaction
- Increase revenues
- Achieve or maintain regulatory compliance
- Improve supplier relationships
- Cut costs

Please rate the importance of the following IT objectives in influencing your IT investment strategy in 2014:

- Better demonstrate the value of IT to the business
- Align IT with overall business goals
- Use IT to support revenue growth
- Meet internal service level agreements
- Deliver new functionality to business users

Average rating:

(1 = not an objective, 4 = top priority) 137 respondents
Appendix

This report presents the findings from a survey of X Brazilian enterprises regarding their Information & Communications Technology (ICT) investment trends. The survey investigates how Brazilian enterprises currently allocate their ICT budgets across the core areas of enterprise ICT expenditure: hardware, software, IT services, communications, and consulting.

The report illustrates the core technologies enterprises are investing in, including enterprise applications, mobility, and cloud computing. The survey also highlights the approach adopted by enterprises in Brazil when purchasing technology. Through Kable’s survey, the report aims to provide better insight to ICT vendors and services providers when pitching their solutions to enterprises in Brazil.

The survey was conducted in Q1 2015 via an online methodology, with respondents all having ICT decision maker responsibility (typically CIOs and IT Managers). Kable plans to repeat the survey in Q1 2016, in order to monitor ICT budget changes on an ongoing basis.

Reason to buy

- Understand how the Brazilian enterprise ICT landscape is set to change in 2015 to prioritize your target market
- Comprehend how ICT Brazilian Real are being allocated by Brazilian enterprises in specific verticals and size bands to improve your market penetration
- Make effective business decisions by recognizing the opportunities within each of the core areas of ICT spend (hardware, software, IT services, telecommunications, and consulting)
- Realign your sales initiatives by understanding the current strategic objectives of Brazilian enterprises
- Enhance your market segmentation with the included, detailed breakdown of opportunities within selected technology categories (enterprise application, mobility and cloud computing)
- Prioritize your focus areas by understanding which factors are influencing Brazilian enterprises’ decisions when selecting an ICT provider
- Understand the changes in customers’ priorities and identify the business and IT objectives that Brazilian enterprises are looking to achieve through their ICT investment strategies
Appendix

Report Methodology

Kable’s Customer Insight Survey reports are primarily based on the information (related to ICT budgets, priorities and procurement plans) collected through an annual survey performed in the first quarter of every year. The primary research involves a major program of interviewing CIOs and IT executives regarding their IT investment and priorities. The secondary research process involves covering publicly available sources, company annual reports, and press releases. The content in the report is written by analyzing the survey findings and substantiating those findings through secondary research.

About Kable

Kable delivers unparalleled customer and market insight into enterprise ICT investment trends. Covering 12 key sectors in 33 locations, we identify investment patterns and trends, monitor how ICT budgets are set to change, inform our clients about the top-spending organisations, and provide market opportunity forecasts.

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Appendix

Further reading

ICT investment trends in Germany, April 2015
ICT investment trends in the UK, May 2015
ICT investment trends in France, May 2015
ICT investment trends in Italy, May 2015