The Pressure Point Index: V

September 2004
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Foreword by Russell Flower, director of managed services at Synstar

The Pressure Point Index (PPI) is an annual piece of pan-European research into the pressures faced by IT directors.

The purpose of the research is to gain an understanding of the demands upon the IT director in the context of his/her evolving role. The PPI benchmarks key pressures year-on-year, and also investigates specific areas, such as budgetary pressures, IT strategy, skills and personal development, and the trend towards outsourcing.

The PPI reveals growing stress levels among IT directors. The PPI shows that the key concerns facing IT directors fall into two areas: adding greater value to the business through strategic decision-making, and IT system security and stability.

I’ve seen this first hand, talking to many IT directors who find there simply aren’t enough hours in the day for strategy and fire-fighting.

In response to this, we’re seeing a trend towards selective outsourcing - particularly outsourcing mission-critical functions such as user support, business continuity, network and data management and infrastructure support and maintenance.

More and more IT directors are turning to selective outsourcing to improve performance and system stability and cut costs, but without losing control of IT strategy. By outsourcing specific mission-critical tasks, IT directors can leave someone else to worry about fundamental tasks such as data management and network monitoring, and concentrate on strategy.

The research also suggests at the huge pressures upon the IT director to demonstrate the value of IT to the business. Outsourcing selected tasks to a managed services provider will often reduce costs whilst freeing up their own time to develop ways to deliver greater benefit to the business.
**Rising stress levels**

PPI V shows a steady increase in the pressure gauge. The PPI value has increased from 193 in 2002 to 197 in 2003, to 200 points in 2004.

Ensuring IT strategy is aligned with business strategy (79%) and demonstrating ROI (71%) are concerns. Other major pressure points are security of IT systems (89%) and making sure IT is available 24/7 (76%).

Overall, 17% admit they have problems coping with the stresses of the job. And 34% say that managing too great a workload is the main cause of stress. Tough directorial demands (23%) and a lack of control (29%) are also pushing IT directors to the brink.

The stress spiral is so intense that 23% of IT directors questioned fear for their job security. When asked about the greatest threats to job security, IT directors pointed to a lack of business benefit from IT (30%) and the IT infrastructure crashing one too many times (14%).

For many IT directors, the pressure is interfering with their personal lives. Over 90% (91%) take calls out of work hours, and it seems the stress could be having an adverse effect on their personal life and health: 85% and 87% respectively say health and personal relationships are areas of concern.

IT directors in Spain, Ireland and France appear to feel under the most stress and worry more about a wider set of issues than their peers. Those in Germany and the Netherlands appear to feel the pressure the least, with UK IT directors falling mid-table.

**Selective outsourcing**

IT directors across Europe are in favour of keeping IT strategy management in-house, whilst outsourcing basic mission-critical functions. 97% of IT directors wish to keep control of IT strategy, with 37% highlighting strategy as the most enjoyable part of their job.

The majority (58%) see selective outsourcing as the most effective way for the business to save costs whilst improving performance. Only 4% believe that wholesale outsourcing of the IT function is an effective option, and are put off by problems with cost control, visibility and supplier management. 19% believe that delegating intellectual property by outsourcing strategy is bad for the business.

Key benefits of selective outsourcing highlighted by those questioned include cost control (14%), guaranteed service levels (24%), access to a wider pool of skills (29%) and greater visibility (9%). For 28% the principal benefit of outsourcing selected tasks to a managed services provider is freeing up internal resources to focus on the job in hand.

**Budgets focus on business benefit over cost-cutting**

While IT budgets remain tight, IT buying is now more likely to be driven by business benefit (39%) and system stability and up-time (40%) than to reduce costs.

However, the budget freeze experienced by two thirds (67%) of European organisations has left IT directors fearing for their job security. More than half (56%) view cost cutting as the greatest threat to their role.

When asked about the most effective way to save costs, 58% said selective outsourcing, 21% said reduced spend on new software and 9% reduced spend on new hardware. Only 4% viewed wholesale outsourcing as an effective cost-cutter and just 7% favoured job losses.
The questions

On a scale of 1 – 3 how much do the following worry you?
- Job security
- Demanding IT users
- Ensuring IT strategy is aligned with business strategy
- IT not being voiced / valued at a board level
- Managing too great a workload
- Instability of IT systems
- Keeping abreast of the latest technologies
- Security of IT systems
- Making sure IT is available 24/7
- The cost of downtime
- Managing IT costs
- Demonstrating ROI
- The IT skills shortage
- Managing my work-life balance
- Lack of Government support for the IT industry
- The economic climate
Which responsibilities would you ideally outsource?
What do you believe to be the main benefits of outsourcing selected tasks to a managed services provider?
Which of the following IT functions would you consider outsourcing offshore, and which would you not consider outsourcing offshore?
Which of the following most puts you off outsourcing?
In your opinion, which of the following would be the most effective way for your business to save costs whilst improving performance?
Is it possible to keep abreast of changing trends in the IT industry, and factors such as regulation which impact IT Management?
Who do you trust most to give you sound advice on IT management?
How trusting are you of IT suppliers on a scale of 1 to 4?
How does this year’s IT budget compare with last year?
Where has IT budget been spent least wisely in the last 12 months?
Does your company always gain a healthy return on investment from IT?
What is the main driver for IT purchasing decisions?
Do you believe there is still an IT skills shortage?
What skills areas are there less demand for?
Which of the following pressures do you worry about most?
On average, how much unscheduled IT downtime does your company experience each week?
Which IT systems/services are most mission critical?
What worries you most when making sure IT supports the business 24/7?
Which part of your job do you most enjoy?
Which of the following is the greatest threat to your own job security?
How frequently do you take calls out of work hours?
Outside of work hours, what do you worry about most?
What makes you feel stressed at work?
How well do you cope with stress?
Which western-European nationalities do you think are best disposed to forming and maintaining co-operative working relationships?
Who is your IT hero?
Are you? Male – Female / Which of the following age brackets do you fall into?
The survey was carried out among IT managers and IT directors in the following regions:

- BeLux
- Ireland
- France
- Netherlands
- Spain
- Germany
- UK

The questionnaire was mailed to IT managers/directors, divided equally between the following vertical industries:

- Banking
- Insurance
- Manufacturing
- Public Sector
- Retail
- Miscellaneous

The IT managers selected were located at head or central office of a company with a minimum of 200 employees.

Of the responses, 700 completed questionnaires formed the basis of the results, representing each country and sector proportionately. The non-sector specific responses (other/ miscellaneous) are included in the overall responses but not illustrated in the sector comparisons.

All results shown are percentages calculated from the raw data. Where necessary rounded up or down from decimal points accordingly. This means that in some cases, the totals add up to 99% or 101%.

In each PPI survey, one set of metrics - the index – is compared. This is the first question, which asks IT directors to rate their concern about a key number of issues. This data is presented in percentages, and is used to calculate a PPI value (please see section ‘How the Pressure Point Index is calculated’). Graphs for question one show how these percentages and index values have changed over the past five years.

Most other questions are newly created in response to industry changes and developments. However, there are selected questions asked in PPI V in 2004 that were also asked in PPI IV in 2003. Where this is applicable the comparative results for 2003 / PPI IV are also shown.

The fieldwork was completed in August 2004.
Respondents are asked to rate the pressures they face in the following three areas:

<table>
<thead>
<tr>
<th>Internal Business issues</th>
<th>IT issues</th>
<th>External issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job security</td>
<td>Instability of IT systems</td>
<td>The IT skills shortage</td>
</tr>
<tr>
<td>Demanding IT users</td>
<td>Keeping abreast of the latest technologies</td>
<td>Managing my work-life balance</td>
</tr>
<tr>
<td>Ensuring IT strategy is aligned with and supports business strategy</td>
<td>Security of IT systems</td>
<td>Lack of Government support for the IT industry</td>
</tr>
<tr>
<td>IT not being voiced/valued at a board level</td>
<td>Making sure IT supports the business 24/7</td>
<td>The economic climate</td>
</tr>
<tr>
<td>Managing too great a workload</td>
<td>The cost of downtime</td>
<td>—</td>
</tr>
</tbody>
</table>

Each pressure is rated between one and three as follows:
- 1 = no concern
- 2 = some concern
- 3 = worried

Responses are then weighted according to the degree to which respondents are concerned. The percentage of respondents rating each issue at each level (1, 2 or 3) is multiplied by 1, 2 or 3 accordingly, to produce the PPI value.

For example, when respondents were asked how much they worry about IT not being voiced/valued at board level, the overall results were as follows:
- 1. No concern - 22%
- 2. Little concern – 35%
- 3. Worried – 44%

So the PPI values for this question are calculated as follows:
- 22% said IT not being voiced/valued at board level was of no concern. 1 x 22 = 22
- 35% said they were a little concerned about IT not being voiced/valued at board level. 2 x 35 = 70
- 44% said they were worried about IT not being voiced/valued at board level. 3 x 44 = 132

So the total PPI value for this question is the sum of 41 + 84 + 51, which equals 224.

A PPI value is also calculated per sub-section (internal business issues, IT issues and external issues) from the average PPI for each sub-section – shown in graphs 1.g and 1.h). An overall PPI value is calculated from the average of each individual PPI value.
Graphs showing levels of concern about key issues among IT directors

1a. The Pressure Point Index % results 2004

1b. The Pressure Point Index % results 2003
The Pressure Point Index

1c. The Pressure Point Index % results 2002

1d. The Pressure Point Index % results 2002

0 10 20 30 40 50 60 70

Job security

The economic climate
Lack of Government support for the IT industry
Managing my work-life balance
The IT skills shortage
Managing IT costs and demonstrating ROI
Making sure IT supports the business 24/7 the cost - the cost of downtime
Security of IT systems
Keeping abreast of the latest technologies
Instability of IT systems
IT not being voiced/valued at a board level
Ensuring IT strategy is aligned with and supports business strategy
Overly demanding IT users

1 = Worried
2 = Some concern
3 = No concern
The Pressure Point Index

1e. Pressure point values: 2001-2004

| Year | Job security | Overly demanding IT users | Ensuring IT strategy is aligned with business | IT not being valued at board level | Average PPI IT systems | Instability of IT systems | Security of IT systems | Meeting bonafide IT needs | The cost of downtime | Managing IT costs | Demonstrating ROI | Average PPI IT issues | The IT skills shortage | Managing my work-life balance | Lack of Government support | The economic climate | Average PPI external |
|------|--------------|---------------------------|---------------------------------------------|----------------------------------|-------------------------|------------------------|-------------------------|----------------------|------------------------|------------------|----------------|----------------|------------------|------------------|-----------------------------|-----------------------------|-----------------------------|----------------------|
| 2004 | 196          | 197                       | 216                                         | 224                              | 218                     | 208                    | 191                     | 198                  | 132                    | 188              | 199           | 198            | 201              | 179              | 195                          | 174                          | 174                          | 211                  |
| 2003 | 176          | 202                       | 265                                         | 196                              | 195                     | 193                    | 197                     | 224                  | 211                    | 211              | 200           | 200            | 204              | 174              | 177                          | 177                          | 219                          | 103                  |

Note: The chart shows the Pressure Point Index values for various IT-related issues from 2001 to 2004.
The Pressure Point Index

1.e Pressure point values: 2001 - 2004
Overall results

2. Which responsibilities would you ideally outsource?

3. What do you believe to be the main benefits of outsourcing selected tasks to a managed services provider?

4. Which of the following IT functions would you consider outsourcing offshore, and which would you not consider outsourcing offshore?

![Graph showing outsourcing responsibilities and benefits]

![Graph showing IT functions for outsourcing]

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Overall results

5. Which of the following most puts you off outsourcing?

- Difficulty in controlling costs
- Loss of visibility and control
- Delegating intellectual property is bad for the business
- Difficulty in managing multiple suppliers
- Threat to job security for IT staff

6. In your opinion, which of the following would be the most effective way for your business to save costs whilst improving performance?

- Reduce spend on new hardware
- Reduce spend on new software
- Wholesale outsourcing
- Selective outsourcing
- Job cuts

7. Is it possible to keep abreast of changing trends in the IT industry, and factors such as regulation which impact IT management?

- No, it is impossible to keep fully informed
- I'm not as informed as I could be
- I'm moderately informed
- I am completely informed
8. Who do you trust most to give you sound advice on IT management?

9. How trusting are you of IT suppliers on a scale of 1 to 4? 4 = high level of trust, 1 = do not trust IT suppliers at all

10. In your view, what are the most common reasons why outsourcing relationships fail?
11. How does this year's IT budget compare with last year?

The graph shows the comparison between 2003 and 2004 for the IT budget. The budget was either lower, the same, or higher compared to the previous year. The data indicates a slight increase in the budget in 2004 compared to 2003.

12. Where has IT spend been spent least wisely in the last five years?

The graph illustrates the allocation of IT spend in different areas such as Support services, Maintenance, Desktop hardware, Infrastructure, Systems Integration, and Enterprise software. The data shows a decrease in spend on desktop hardware and an increase in support services and enterprise software.

13. Does your company always gain a healthy return on investment from IT?

The graph presents the percentage of companies that gain a healthy return on investment from IT. The data indicates that most companies gain a healthy return, with a slight decrease in the percentage in 2004 compared to 2003.
Overall results

14. What is the main driver for IT purchasing decisions?

- To improve system stability and ‘up-time’ of applications
- To achieve business benefit
- To cut costs
- To get the latest technology

15. Do you believe there is still an IT skills shortage?

- 2003
- 2004

16. What skills areas are hardest to find, and which are there less demand for?

- Application development
- Network management
- Helpdesk/trouble shooting
- Security
- IT/business strategy
- Systems integration

The graphs show the percentage of respondents who believe in the shortage or less demand for these skills.
17. Which of the following pressures do you worry about most?

- Not being included in strategic decision making which impacts IT
- IT overspend / managing costs
- Meeting IT service delivery levels for the business
- Making the right IT management decisions
- Pay package
- Not being valued by the business
- Managing too great a workload
- I don’t worry

18. On average, how much unscheduled IT downtime does your company experience each week?

- No more than 5 mins
- 6 - 15 mins
- 15 - 30 mins
- 30 - 60 mins
- 1 - 2 hours
- 3 hours

19. Which IT systems / services are most mission critical? (1 = most critical, 5 = least critical)

- Email
- Internet access
- File and print server
- Accounting system
- Client database / CRM system
20. What worries you most when making sure IT supports the business 24/7?

Loss of power: 26%
ISP interruption: 13%
Server going down: 12%
Staffing problems: 10%
Security breaches and viruses: 9%
Mass spam mail bringing down the network: 29%

21. Which part of your job do you most enjoy?

Desktop support / maintenance: 37%
Network and data management: 14%
Business Continuity: 7%
User Support: 13%
Staff management: 15%
IT strategy: 15%

22. Which of the following is the greatest threat to your own job security?

Lack of proven business benefits from existing IT strategy: 30%
Drive to cut costs: 14%
The IT infrastructure crashing ‘one too many times’: 56%
23. How frequently do you take calls out of work hours?

![Bar chart showing frequency of calls taken out of work hours in 2003 and 2004.]

24. Outside of work hours, what do you worry about the most?

![Bar chart showing concerns outside of work hours in 2003 and 2004.]

25. What makes you feel stressed at work?

![Pie chart showing reasons for stress at work.]

- Managing too great a workload
- Managerial demands
- Staff demands
- Managing multiple suppliers
- Lack of control
26. How well do you cope with stress?

- Very well: 26
- Moderately well: 59
- Not very well: 17

27. Which nationalities do you think are best disposed to forming and maintaining cooperative working relationships?

- Belgian: 13
- British: 8
- Dutch: 11
- French: 11
- German: 14
- Irish: 9
- Italian: 10
- Luxembourgians: 13
- Spanish: 16
- Swiss: 3
- Other: 2

28. Who is your IT hero?

- Linus Torvalds: 15
- Charles Babbage: 9
- Tim Berners-Lee: 1
- Alan Turing: 2
- Marcian Edward Hoff: 5
- Bill Joy: 2
- Bill Gates: 1
- Paul Allen: 8
- Larry Ellison: 2
- Michael Dell: 3
- Carly Fiorina: 1
- Steve Jobs: 3
- Other: 5

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29. Are you?

30. Which of the following age brackets do you fall into?
1. On a scale of 1-3 how much do the following worry you?

**Internal business issues: Job security**

<table>
<thead>
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<th>Country</th>
<th>1</th>
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**Internal business issues: Demanding IT users**

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**Internal business issues: Ensuring IT strategy is aligned with and supports business strategy**

<table>
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<tr>
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</table>
Internal business issues: Keeping abreast of the latest technologies

1 = No concern
2 = Some concern
3 = Worried

BeLux Ireland France Netherlands Spain Germany UK

Internal business issues: Security of IT systems

BeLux Ireland France Netherlands Spain Germany UK

Internal business issues: Making sure IT is available 24/7

BeLux Ireland France Netherlands Spain Germany UK
Country Comparisons

Internal business issues: The cost of downtime

1 = No concern
2 = Some concern
3 = Worried

Internal business issues: Managing IT costs

Internal business issues: Demonstrating ROI
Country Comparisons

External issues: The IT skills shortage

1 = No concern  
2 = Some concern  
3 = Worried

External issues: Managing work - life balance

External issues: Lack of Government support for the IT industry
Country Comparisons

External issues: The economic climate

1 = No concern
2 = Some concern
3 = Worried

BeLux: 44
Ireland: 28
France: 10
Netherlands: 64
Spain: 38
Germany: 64
UK: 51

Bar chart showing the economic climate concerns across different countries.
2. Which responsibilities would you ideally outsource?

3. What do you believe to be the main benefits of outsourcing selected tasks to a managed services provider?
4. Which of the following IT functions would you consider outsourcing offshore, and which would you not consider outsourcing offshore?

### Desktop Support / Maintenance

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<th>On</th>
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<tbody>
<tr>
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<td>7%</td>
<td>93%</td>
</tr>
<tr>
<td>Germany</td>
<td>18%</td>
<td>82%</td>
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<tr>
<td>Spain</td>
<td>8%</td>
<td>92%</td>
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<td>Netherlands</td>
<td>9%</td>
<td>93%</td>
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<tr>
<td>France</td>
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<td>63%</td>
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<td>Ireland</td>
<td>7%</td>
<td>65%</td>
</tr>
<tr>
<td>BeLux</td>
<td>7%</td>
<td>91%</td>
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### Network and Data Management

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<td>9%</td>
<td>91%</td>
</tr>
<tr>
<td>Germany</td>
<td>18%</td>
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</tr>
<tr>
<td>Spain</td>
<td>34%</td>
<td>67%</td>
</tr>
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<td>Netherlands</td>
<td>18%</td>
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<td>France</td>
<td>33%</td>
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<td>BeLux</td>
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### Business Continuity

<table>
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<tbody>
<tr>
<td>UK</td>
<td>33%</td>
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<td>Germany</td>
<td>13%</td>
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<tr>
<td>BeLux</td>
<td>33%</td>
<td>64%</td>
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</table>
Country Comparisons

User support

Staff management

IT strategy
5. Which of the following most puts you off outsourcing?

- Threat to job security for IT staff
- Difficulty in managing multiple suppliers
- Delegating intellectual property is bad for the business
- Loss of visibility and control
- Difficult to control costs

![Country Comparisons Graph]

6. In your opinion, which of the following would be the most effective way for your business to save costs whilst improving performance?

- Job cuts
- Selective outsourcing
- Wholesale outsourcing
- Reduce spend on new software
- Reduce spend on new hardware

![Country Comparisons Graph]

7. Is it possible to keep abreast of changing trends in the IT industry, and factors such as regulation which impact IT management?

- No, it is impossible to keep fully informed
- I’m not as informed as I could be
- I’m moderately informed
- I am completely informed

![Country Comparisons Graph]
8. Who do you trust most to give you sound advice on IT management?

9. How trusting are you of IT suppliers on a scale of 1 to 4. 4 = high level of trust, 1 = do not trust IT suppliers at all?

10. In your view, what are the most common reasons why outsourcing relationships fail?
11. How does this year’s IT budget compare with last year?

12. Where has IT spend been spent least wisely in the last five years?

13. Does your company always gain a healthy return on investment from IT?
14. What is the main driver for IT purchasing decisions?

- To get the latest technology
- To cut costs
- To achieve business benefit
- To improve system stability and ‘up-time’ of applications

15. Do you believe there is still an IT skills shortage?

- Yes
- No
16. What skills areas are hardest to find, and which are there less demand for?

**Country Comparisons**

<table>
<thead>
<tr>
<th>Skill Area</th>
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Country Comparisons

### Helpdesk/trouble shooting

<table>
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<tr>
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<th>Belgium-Luxembourg (BelLux)</th>
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### Network management

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### Application development

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</tbody>
</table>
17. Which of the following pressures do you worry about most?

[Country Comparisons Chart]

18. On average, how much unscheduled IT downtime does your company experience each week?

[Country Comparisons Chart]
19. Which IT systems / services are most mission critical? (1 = most critical, 5 = least critical)

**Belux**

<table>
<thead>
<tr>
<th>Service</th>
<th>1</th>
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<th>4</th>
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<tr>
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**Ireland**

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**France**

<table>
<thead>
<tr>
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<th>3</th>
<th>4</th>
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<td>Client database / relationship management system</td>
<td>16</td>
<td>15</td>
<td>14</td>
<td>13</td>
<td>12</td>
</tr>
</tbody>
</table>
Country Comparisons

**Netherlands**

- Email: 31
- Internet access: 15
- File and print server: 25
- Accounting system: 17
- Client database / relationship management system: 24

**Spain**

- Email: 32
- Internet access: 21
- File and print server: 29
- Accounting system: 21
- Client database / relationship management system: 24

**Germany**

- Email: 26
- Internet access: 24
- File and print server: 25
- Accounting system: 24
- Client database / relationship management system: 33
20. What worries you most when making sure IT supports the business 24/7?

![Bar chart showing country comparisons for worrying about IT support issues.]

21. Which part of your job do you most enjoy?

![Bar chart showing country comparisons for job enjoyment by task.]

Page 41
22. Which of the following is the greatest threat to your own job security?

Select from: Lack of proven business benefits from existing IT strategy, Drive to cut costs, The IT infrastructure crashing 'one too many times'.

23. How frequently do you take calls out of work hours?

Select from: Often, Occasionally, Never.
Country Comparisons

24. Outside of work hours, what do you worry about the most?

**Personal life and relationships**

<table>
<thead>
<tr>
<th>Country</th>
<th>1 Worried</th>
<th>2 Little worried</th>
<th>3 Some concern</th>
<th>4 No Concern</th>
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<td>11</td>
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**Money**

<table>
<thead>
<tr>
<th>Country</th>
<th>1 Worried</th>
<th>2 Little worried</th>
<th>3 Some concern</th>
<th>4 No Concern</th>
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<tr>
<td>BeLux</td>
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<td>UK</td>
<td>31</td>
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<td>27</td>
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</tr>
</tbody>
</table>
Country Comparisons

25. What makes you feel stressed at work?

26. How well do you cope with stress?

27. Which nationalities do you think are best disposed to forming and maintaining cooperative working relationships?
28. Who is your IT hero?

30. Are you?

31. Which of the following age brackets do you fall into?
1. On a scale of 1-3 how much do the following worry you?

<table>
<thead>
<tr>
<th>Sector</th>
<th>Internal business issues: Job security</th>
<th>Internal business issues: Demanding IT issues</th>
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<td>Public Sector</td>
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<tr>
<td>Retail</td>
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<td>43</td>
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</table>

- **Banking**: 52 (1), 36 (2), 33 (3)
- **Insurance**: 38 (1), 41 (2), 43 (3)
- **Manufacturing**: 57 (1), 32 (2), 36 (3)
- **Public Sector**: 52 (1), 12 (2), 40 (3)
- **Retail**: 44 (1), 19 (2), 33 (3)
Sector Comparisons

Internal business issues: Ensuring IT strategy is aligned with and supports business strategy

<table>
<thead>
<tr>
<th>Sector</th>
<th>1 = No concern</th>
<th>2 = Concerned</th>
<th>3 = Worried</th>
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<td>Public sector</td>
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<tr>
<td>Retail</td>
<td>39</td>
<td>33</td>
<td>30</td>
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</table>

Internal business issues: IT not being voiced/value at board level

<table>
<thead>
<tr>
<th>Sector</th>
<th>1 = No concern</th>
<th>2 = Concerned</th>
<th>3 = Worried</th>
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<tr>
<td>Retail</td>
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<td>33</td>
<td>14</td>
</tr>
</tbody>
</table>
Sector Comparisons

**Internal business issues: Managing too great a workload**

- **Banking**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Insurance**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Manufacturing**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Public sector**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Retail**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

**IT issues: Instability of IT systems**

- **Banking**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Insurance**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Manufacturing**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Public sector**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried

- **Retail**
  - 1 = No concern
  - 2 = Concerned
  - 3 = Worried
Sector Comparisons

**IT issues: Keeping abreast of the latest technologies**

**IT issues: Security of IT systems**
Sector Comparisons

**IT issues: Making sure IT is available 24/7**

**IT issues: The cost of downtime**
Sector Comparisons

**IT issues: Managing IT costs**

- Banking: 35, 35, 30
- Insurance: 33, 47
- Manufacturing: 20, 57, 57
- Public sector: 35, 16, 17
- Retail: 33, 47

1 = No concern  
2 = Concerned  
3 = Worried

---

**IT issues: Demonstrating ROI**

- Banking: 22, 38, 39
- Insurance: 41, 30
- Manufacturing: 25, 47, 28
- Public sector: 36, 51
- Retail: 39, 43

1 = No concern  
2 = Concerned  
3 = Worried
Sector Comparisons

External issues: The IT skills shortage

External issues: Managing my work-life balance
Sector Comparisons

External issues: Lack of Government support for the IT industry

- Banking: 50 (14), 43 (44), 45 (13), 35 (20), 36 (24), 71 (19)
- Insurance: 0 (10), 36 (29), 22 (30), 14 (43), 41 (43), 15 (42)
- Manufacturing: 0 (10), 27 (25), 45 (14), 40 (34), 43 (27), 10 (10)
- Public sector: 0 (10), 38 (36), 42 (27), 40 (27), 71 (19)
- Retail: 0 (10), 10 (10), 19 (19)

External issues: The economic climate

- Banking: 14 (45), 29 (41), 42 (29), 42 (42), 45 (30), 45 (43)
- Insurance: 0 (10), 27 (25), 32 (32), 30 (30), 40 (30), 22 (22)
- Manufacturing: 0 (10), 27 (25), 45 (14), 40 (34), 43 (27), 10 (10)
- Public sector: 0 (10), 38 (36), 42 (27), 40 (27), 71 (19)
- Retail: 0 (10), 10 (10), 19 (19)
2. Which responsibilities would you ideally outsource?

3. What do you believe to be the main benefits of outsourcing selected tasks to a managed services provider?
4. Which of the following IT functions would you consider outsourcing offshore, and which would you not consider outsourcing offshore?

**Desktop support / maintenance**

**Network and data management**

**Business continuity**
5. Which of the following most puts you off outsourcing?

6. In your opinion, which of the following would be the most effective way for your business to save costs whilst improving performance?

7. Is it possible to keep abreast of changing trends in the IT industry, and factors such as regulation which impact IT management?
8. Who do you trust most to give you sound advice on IT management?

![Bar chart showing sector comparisons for trust in IT management advice.]

9. How trusting are you of IT suppliers on a scale of 1 to 4? 4 = high level of trust, 1 = do not trust IT suppliers at all.

![Bar chart showing sector comparisons for trust in IT suppliers.]

10. In your view, what are the most common reasons why outsourcing relationships fail?

![Bar chart showing sector comparisons for reasons outsourcing relationships fail.]

- Supplier does not deliver
- Not good value for money
- Lack of mutual trust
- Personal relationship between supplier and customer
- Lack of constructive working partnership
- Customer unwilling to take advice
11. How does this year’s IT budget compare with last year?

12. Where has IT spend been spent least wisely in the last five years?

13. Does your company always gain a healthy return on investment from IT?
14. What is the main driver for IT purchasing decisions?

![Bar chart showing the main driver for IT purchasing decisions across different sectors.](chart)

- To get the latest technology
- To cut costs
- To achieve business benefit
- To improve system stability and 'up-time' of applications

15. Do you believe there is still an IT skills shortage?

![Bar chart showing the percentage of respondents who believe there is still an IT skills shortage across different sectors.](chart)
16. What skills areas are hardest to find, and which are there less demand for?

- Systems integration
  - Banking: High, Insurance: Low, Manufacturing: Neither high or low, Public sector: High, Retail: Low

- IT / business strategy
  - Banking: High, Insurance: Low, Manufacturing: Neither high or low, Public sector: High, Retail: Low

- Security
  - Banking: High, Insurance: Low, Manufacturing: Neither high or low, Public sector: High, Retail: Low
17. Which of the following pressures do you worry about most?

- Not being included in strategic decision making which impacts IT
- IT overspend / managing costs
- Meeting IT service delivery levels for the business
- Making the right IT management decisions
- Pay package
- Not being valued by the business
- Managing too great a workload
- I don't worry

18. On average, how much unscheduled IT downtime does your company experience each week?

- No more than 5 mins
- 5 - 15 mins
- 15 - 30 mins
- 30 - 60 mins
- 1 - 2 hours
- 3 hours
19. Which IT systems / services are most mission critical? (1 = most critical, 5 = least critical)
Sector Comparisons

Accounting system

Client database / relationship management system
20. What worries you most when making sure IT supports the business 24/7?

- Loss of power
- ISP interruption
- Server going down
- Staffing problems
- Security breaches and viruses
- Mass spam mail bringing down the network

21. Which part of your job do you most enjoy?
22. Which of the following is the greatest threat to your own job security?

- Lack of proven business benefits from existing IT strategy
- Drive to cut costs
- The IT infrastructure crashing ‘one too many times’

23. How frequently do you take calls out of work hours?

- Often
- Occasionally
- Never
24. Outside of work hours, what do you worry about the most?

1 = Worried
2 = Little worried
3 = Some concern
4 = No Concern

### Personal life and relationships

**Banking**
- 1: 41
- 2: 6
- 3: 10
- 4: 0

**Insurance**
- 1: 6
- 2: 30
- 3: 10
- 4: 0

**Manufacturing**
- 1: 41
- 2: 0
- 3: 10
- 4: 0

**Public sector**
- 1: 47
- 2: 25
- 3: 10
- 4: 0

**Retail**
- 1: 41
- 2: 6
- 3: 10
- 4: 0

### Money

**Banking**
- 1: 35
- 2: 33
- 3: 10
- 4: 0

**Insurance**
- 1: 34
- 2: 26
- 3: 14
- 4: 0

**Manufacturing**
- 1: 37
- 2: 25
- 3: 14
- 4: 0

**Public sector**
- 1: 43
- 2: 27
- 3: 14
- 4: 0

**Retail**
- 1: 40
- 2: 10
- 3: 14
- 4: 0
Sector Comparisons

**Work and career**

<table>
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<th>Public sector</th>
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**Health**

<table>
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<th>Public sector</th>
<th>Retail</th>
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<td>19</td>
<td>12</td>
<td>28</td>
</tr>
<tr>
<td>4 = No Concern</td>
<td>43</td>
<td>40</td>
<td>13</td>
<td>20</td>
<td>50</td>
</tr>
</tbody>
</table>
25. What makes you feel stressed at work?

26. How well do you cope with stress?

27. Which nationalities do you think are best disposed to forming and maintaining cooperative working relationships?
28. Who is your IT hero?

30. Are you?

31. Which of the following age brackets do you fall into?

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Banking Insurance Manufacturing Public sector Retail

Male Female
For further information please contact
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