

# Industry Dynamics: 2010 Guide to Technology in the Utilities Industry

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## Abstracts

### Introduction

This brief provides an overview of the opportunities and challenges that vendors are likely to encounter in the utilities industry, outlining the key structures and developments, and the effect they have on decision makers and end-users.

### Scope

- Provides an overview of how utilities have implemented technology to manage unprecedented pressures in the industry.
- Ovum's take on the technology priorities of utilities
- Provides recommendations to vendors navigating the IT market in utilities

### Highlights

The technologies that underpin utilities' business processes are typically kept separate from each other, are often based around proprietary standards, and have low interoperability with other systems in other parts of the business

The pace of change in the utilities industry is increasing rapidly, driven by environmental concerns, aging and inadequate delivery networks, market liberalization, scarcity of resources, increasing fuel costs, a rapidly aging workforce, and increasing payment defaults

As these business processes change, so does the technology that supports them. The traditional model of siloed technologies will slowly give way to more interoperable systems, providing an enterprise-wide view of a utility's business

### **Reasons to Purchase**

- Learn about the priorities facing utilities
- Understand the drivers and inhibitors behind the adoption of technology in utilities
- Identify strategies which vendors should adopt for future success in winning utility business

## Contents

### SUMMARY

Catalyst  
Ovum View  
Key Messages

### **FAR FROM HOMOGENEOUS, THE UTILITIES INDUSTRY IS SURPRISINGLY DIVERSE**

The utilities industry principally provides electricity, gas and water

There are numerous divisions within a utility business

The upstream division of a utility business is centered around 'Plan, Build, Operate and Maintain'

T&D is again focused principally on asset strategy

Downstream is concerned with recovering payment from consumers

Commodity trading and risk management

The structure and size of individual utilities is diverse and varies by geography

Europe is characterized by large investor-owned utilities, and markets that are heading toward liberalization at varying speeds

The US market is fragmented with varying degrees of liberalization

Utilities serve both mass residential and commercial & industrial customers

utilities' business requirements HAVE Historically BEEN SUPPORTED by siloed technology

Operation technology (generation and T&D)

Meter-to-cash technology

CTRM technology

### **EXTRANEOUS PRESSURES ARE FORCING UTILITIES TO CHANGE DECADES-OLD BUSINESS PROCESSES**

Environmental concerns have led governments and regulators to reduce carbon emissions

Future capital expenditure in infrastructure is vast

Market liberalization is coming, albeit slowly

Utilities are facing an unprecedented demand on resources, particularly in electricity and water

The high cost of fuel has put pressure on utility retail prices and has forced cuts in

operating costs

An aging workforce will see a large proportion of utility staff retire over the next 10 years

The economic downturn has led to an increase in payment defaults

## **RECOMMENDATIONS FOR VENDORS**

An endless pot of cash does not exist, therefore, utilities will be discerning about their investments

Conservatism is still a barrier to technology investment and outsourcing

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