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WHAT'S NEXT FOR THE GRID?

The Priorities Shaping Energy & Utilities IT

Consultancy Insights Report by Littlefish Group in partnership with Censuswide

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THE COST OF "GOOD ENOUGH" IS GETTING HIGHER

Energy and Utilities organisations are navigating a complex operating environment.

Demand continues to grow, infrastructure is under strain, and digital systems are increasingly intertwined with physical operations. At the same time, new technologies such as AI have entered the picture – bringing opportunity but also added complexity – while tolerance for disruption continues to fall under regulatory scrutiny, public reliance, and the safety implications of outages.

Against that backdrop, IT and operational support plays a central role.

This survey report explores how expectations are changing across the sector, what Energy and Utilities IT leaders now expect from managed services partnerships, where current models are falling short, and what good support needs to deliver next to protect resilience and continuity in environments where downtime carries operational, financial, and safety impacts.

Warm regards,



Tim Bayliss
Business Development Manager

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A SECTOR UNDER STRAIN AND A RESET TAKING SHAPE

Across Energy and Utilities, the conversation around managed services is changing.

Historically, IT support has been assessed on reliability, compliance, and cost discipline. Keeping systems running and incidents controlled was enough to be considered successful. However, as operational environments become more complex and more digitised, that definition is starting to unravel...

According to our latest survey, 100% of Energy and Utilities organisations expect to increase investment in managed services. This number is not driven by expansion for its own sake but reflects the reality that existing approaches are under pressure from multiple directions at once.

A third of organisations plan to increase investment specifically in 24/7 service desk and end-user support, signalling the sector's need for continuous coverage as services become more distributed and availability expectations extend far beyond office hours.

Crucially, this increase in spend is tied to changing expectations. IT leaders are not looking for more activity or more tools; they're looking for outcomes that help them stabilise complex environments, manage risk, and keep essential services running under increasingly difficult conditions.



100% OF ENERGY AND UTILITIES ORGANISATIONS EXPECT TO INCREASE INVESTMENT IN MANAGED SERVICES.

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COST STILL MATTERS, BUT RESILIENCE AND SECURITY LEAD

Cost efficiency remains part of the managed services equation, but it's not the primary measure of value.

When Energy and Utilities IT leaders were asked what outcomes they expect from their managed service partnerships, security, stability, and resilience consistently rose to the top. The most cited expectations are stronger cyber security posture and proactive threat management (23%), faster incident resolution and reduced downtime (21%), and greater operational resilience and disaster recovery readiness (20%).

These priorities reflect the realities of operating critical national infrastructure. Preventing disruptions, containing incidents quickly, and protecting systems against escalating cyber threats now outweigh savings achieved purely through cost reduction.

What is also notable is the breadth of expectations beyond these headline outcomes. Leaders are looking for better integration across legacy and modern platforms, access to specialist skills not available in-house, and reduced complexity across sprawling technology estates. Managed services are being judged on their ability to bring coherence, insight, and confidence into environments that have grown organically over decades.

Value, in this context, is being measured in avoided outages, reduced risk exposure, and the ability to respond quickly when the unexpected happens.

TOP EXPECTED OUTCOMES:

(23%) STRONGER CYBER SECURITY

(21%) REDUCED DOWNTIME

(20%) IMPROVED RESILIENCE AND DISASTER RECOVERY READINES

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THE EXPERIENCE GAP SHOWS UP IN OPERATIONAL RISK

While much of the sector focus is on infrastructure and resilience, our survey also exposed a persistent experience gap.

30% of Energy and Utilities IT leaders cite improving end-user experience and satisfaction as their biggest challenge with current IT support models. On its own, that might sound like a people or process issue, however, in reality, it is closely linked to reliability, visibility, and the performance of critical systems.

This becomes clearer when viewed alongside other challenges cited, e.g., 29% struggle with minimising system downtime and service disruption, while the same proportion highlight difficulties supporting critical frontline, field, or control-room systems. Faster resolution of operational issues remains a challenge for 27% of leaders.

For field-based and operational teams, experience issues are rarely cosmetic. Poor support shows up as delayed work, manual workarounds, increased safety risk, and erosion of confidence in digital tools. As OT and IT environments converge, the impact of friction becomes wider and more immediate.

Improving experience, then, is tightly bound to improving reliability, responsiveness, and the ability to see and address problems before they escalate.



30% CITE END-USER EXPERIENCE AS THE BIGGEST CHALLENGE

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REACTIVE SUPPORT IS LOSING FAVOUR

For many years, reactive support models were accepted as long as incidents were resolved within agreed timescales. That tolerance is diminishing.

While just over half of Energy and Utilities IT leaders describe their current provider as proactive to some extent, the data also shows significant variability in delivery. 25% still experience largely reactive support, where action is taken only after issues occur. A further 21% describe a balanced model, combining reactive and proactive elements.

In environments where downtime can halt operations or compromise safety, reactive-only approaches struggle to meet expectations. Preventing failure carries far more weight than responding quickly after the fact.

As a result, leaders are increasingly looking for service desks that use monitoring, analytics, and automation to identify patterns, anticipate issues, and intervene before users or systems are impacted. In short, proactivity has shifted from a value-add to a baseline expectation.



25%

STILL EXPERIENCE REACTIVE IT SUPPORT

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OPERATING SAFELY ACROSS LEGACY AND MODERN ESTATES

Another strong theme emerging from the research is the challenge of operating safely as complexity increases.

Energy and Utilities organisations are balancing ageing infrastructure with modern platforms, cloud services, AI, and digitally enabled field operations. Managing that mix requires specialist capability and round-the-clock oversight, a shift that's starting to show up in how investment is being targeted.

33% of leaders plan to increase spend on 24/7 service desk and end user support, while significant numbers are also investing more in service analytics and experience management (29%) and cyber security monitoring and response (28%). Nearly three in ten expect to increase investment in operational technology or specialist system support.

33% INCREASING INVESTMENT IN 24/7 SUPPORT

29% IN SERVICE ANALYTICS AND EXPERIENCE MANAGEMENT

These choices point to a desire for better visibility across complex estates, earlier detection of problems, and stronger assurance that both IT and OT environments are being managed with appropriate care.

Effective support, in this context, depends on understanding dependencies across systems, anticipating risk, and maintaining stability as change continues.



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WHAT GOOD SUPPORT LOOKS LIKE BEYOND THE SLA

Service levels and contractual compliance still matter, but they do not fully capture whether managed services are delivering real value.

When Energy and Utilities IT leaders were asked how they define success beyond SLA compliance, their answers focused on capability and collaboration, not just speed. The most cited indicator is automation of routine tasks to free up specialist capacity (27%), followed by strong collaboration between service desk and engineering teams (23%), and faster root cause identification and permanent fixes (20%).

Leaders also value clear communication during major incidents, reduced escalations to senior technical teams, and continuous service improvement driven by insight rather than anecdote.

Taken together, these priorities reflect a shared view of 'what good looks like' in practice: support that reduces noise, prevents recurrence, and works as an extension of internal teams, rather than a transactional layer between problems and solutions.



27% DEFINE SUCCESS BY AUTOMATION THAT FREES SPECIALIST CAPACITY

CONCLUSION: INVESTMENT WITH INTENT

What emerges from the survey is not a rejection of managed services, but a more deliberate and purposeful approach to how they are used.

Energy and Utilities organisations are leaning further into external support, but with clearer expectations and less tolerance for models that only respond after disruption has occurred. While 100% expect to increase investment, that spend is being directed towards outcomes that protect stability, security and resilience across critical operations.

For IT leaders, the priority is ensuring managed services can support essential services reliably as environments grow more complex and risks intensify. For providers, the direction of travel is equally clear. Success is measured less by volume and contractual compliance, and more by the ability to prevent disruption, work closely with internal teams, and keep systems dependable for the communities that rely on them every day.

The question facing the sector is not whether managed services have a role to play, but how those partnerships evolve to meet the realities of what comes next for the grid.



If you are reassessing how your managed services model supports resilience, security and continuity across complex IT and OT environments, we welcome the opportunity to support your next steps and work alongside your teams as those priorities evolve.

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THE RESEARCH CONSULTANTS

The research was conducted by Censuswide, among a sample of 300n IT leaders (aged 21+) in the UK in NHS and Energy and Utilities. The data was collected between 18.02.2026 - 04.03.2026. Censuswide is a member of the Market Research Society (MRS) and the British Polling Council (BPC), and a signatory of the Global Data Quality Pledge. We adhere to the MRS Code of Conduct and ESOMAR principles.