

The Deloitte logo, consisting of the word "Deloitte" in a bold, dark blue sans-serif font, followed by a small green dot.

The Deloitte CIO Survey 2014
CIOs: At the Tech-junction

Belgium

A long-exposure photograph of a complex multi-level highway interchange at night. The image shows numerous overpasses and ramps, with light trails from cars creating a sense of motion and complexity. The scene is illuminated by streetlights and the headlights of vehicles.

Decision time:
Which route will CIOs
take at the
Tech-junction?

Contents

Welcome	2
Summary findings	4
IT budget & priorities	6
CIO portfolio	10
CIO relationships	14
CIO pulse	20
Hot topic – analytics	24
Regional variations	28
About the participants	30

Welcome



Christian Combes

Welcome to the 2014 Deloitte CIO Survey report. In our second year of conducting the survey we have extended our coverage to over 900 CIOs across 49 countries within the Americas, Europe, the Middle East, Africa, Asia and Australia.

Last year we explored the effectiveness of CIOs as business partners and the need for them to step up to make a greater impact within the board room.

This year, we extend the concept and turn the spotlight on the role of the CIO as a business leader of growth through innovation. In particular we explore the idea of the CIO as a Venture Capitalist, an interesting trend we examined in our **Tech Trends 2014 report**.



Patrick Callewaert

We also explore the world of analytics in our Hot Topics section, discussing current adoption levels and key barriers to more widespread use.

This report presents the highlights from the 2014 Deloitte CIO Survey. Within each chapter you'll find:

- A summary of the key insights across all respondents internationally
- An infographic with the findings by major global region and industry sectors
- Commentary, observations and practical tips from Deloitte specialists to help tackle some of the key challenges cited
- Specific observations for the Belgian market

We hope you find this report a valuable tool to help further develop your role as a trusted IT leader. To the many executives who have provided input into the 2014 Deloitte CIO Survey, thank you for your time and insight. We look forward to continuing the dialogue with you.

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“Comparisons between CIOs and VCs may seem like a stretch. CIOs can’t shoot from the hip on risky investments. They provide critical services that the business simply can’t do without, where the risk of getting it wrong could be catastrophic. At the same time, there’s a lot to learn from the portfolio mindset that VCs bring to their work: balancing investments in legacy systems, innovation and even bleeding-edge technologies; understanding and communicating business value; and aligning talent with the business mission. VCs operate in a high-stakes environment where extraordinary value creation and inevitable losses can coexist inside a portfolio of calculated investments. So do CIOs.”

(Tech Trends, Deloitte, 2014)

Summary findings

After a prolonged economic downturn, organisations across the globe are setting their sights on stronger growth, and for many companies, investment in technology is becoming a strategic priority.

Technological innovation is changing the way businesses operate and connect, and firms have the opportunity to recalibrate their operating models to reflect the emerging digital economy. CIOs are associated with maintaining core IT systems for businesses, but a key question in this year's survey is whether they should also take more responsibility for harnessing technology innovation to drive business growth.

Currently 55 percent of the CIO budget is focused on supporting delivery of core IT services, with 22 percent assigned to business growth. CIOs continue to see delivery of business outcomes through IT services as their primary responsibility. That makes sense given their role in managing core systems, but suggests they could do more in applying technology when driving innovation for business growth.

Most CIOs have limited budgets for innovation-related activities and report that risk aversion among other board members constrains them from making riskier IT investments.

The survey results suggest that more could be done to drive the technology growth agenda in the C-suite and CIOs could make more effort to develop networking groups, alliance partners and supplier relationships. Small and niche relationships may also be rich untapped sources of new ideas.

Taken together, these findings suggest that business leaders do not always believe CIOs are the natural choice to drive technological innovation for growth. However, that perception may be changing, and CIOs are becoming more effective business partners with half of CIOs rating themselves "strong and effective" in that regard, a 10 percent increase on last year. A significant majority of CIOs state that responding to new business needs and driving digital strategy are their top priorities for the next 12 to 18 months.

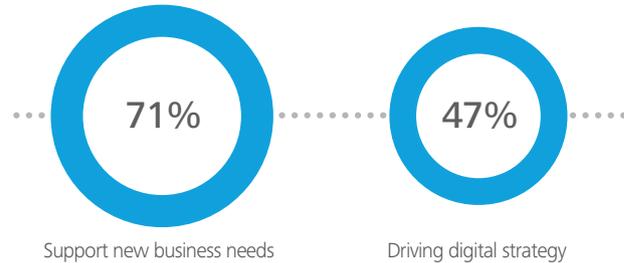
As new technologies proliferate, the role of CIOs may be set to change as they consider how far to take the innovation and growth agenda. However, the rise in prominence of positions such as Chief Marketing, Digital and Data Officers provide organisations with alternatives. **Now is the time for CIOs to choose whether to remain custodians of core IT systems or become drivers of growth through technological innovation.**

Summary findings: infographic

Budget allocation Business as usual vs. Change & growth



IT priorities Top priorities for the next 12-18 months



CIO relationship How effective is your IT function in business partnering?



CIO portfolio IT budget ring-fenced for innovation



CIO pulse What's stopping you from making riskier IT investments?

#1 Business leaders' attitudes to risk



IT budgets & priorities: key findings

Renewed focus on change and growth?

The worst budget cuts are in the past, with only 23 percent of CIOs reporting a decrease in budget in 2014, similar to last year's survey results. CIOs continue to allocate the lion's share of budgets to routine IT activities, but there is a 3 percent shift this year towards change and growth activities, perhaps a reflection of the more positive macro-economic environment. In addition, a significant majority of CIOs state that responding to new business needs and driving digital strategy are their top priorities for the next 12 to 18 months. Strengthening risk and security management jump into the top three priorities, perhaps due to high profile security incidents in the last year.

Belgium

In contrast to the worldwide evolution we see a higher number of CIO's confronted with budget cuts in Belgium. Our survey results indicate that 30 percent of Belgian CIO's reported a decrease of their budgets.

Looking at the allocation of IT budgets we see a confirmation of the worldwide trend to focus more on change and growth activities with an allocation of 48 percent of the Belgian IT budgets.

As to the priorities for the next 12 to 18 months, 73 percent of the CIOs choose for responding to business needs, followed by driving digital strategy, developing IT staff and skills and the consolidation of applications/ infrastructure.

Innovation still lacking funding

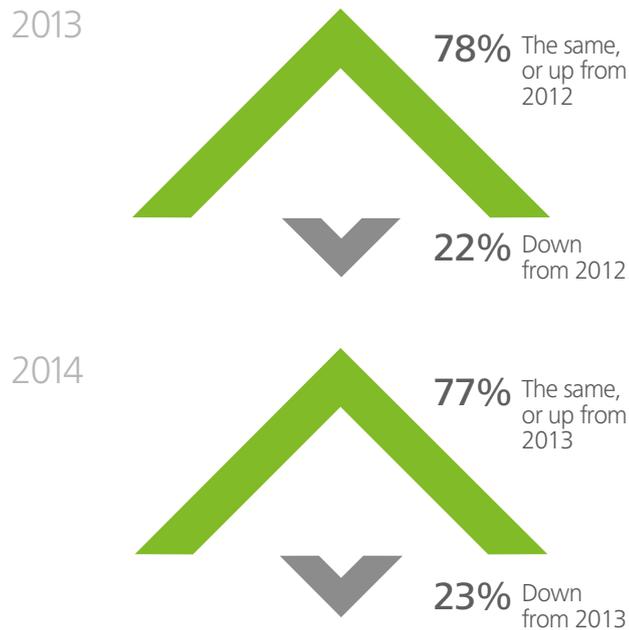
Despite an increase in focus on change and growth activities, there is little sign that budgets are ring-fenced for technology innovation. Almost half of CIOs ring-fence 10 percent or less of their budget for that purpose. Of CIOs allocating a larger portion, 60 percent tend to be organisations with less than 2,000 employees, perhaps reflecting the entrepreneurial mindset of smaller businesses.

Belgium

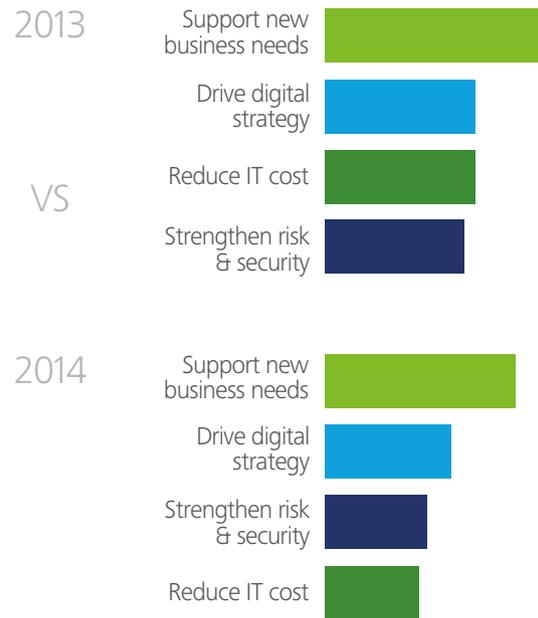
For Belgium there seems to be less of a correlation between budget for innovation and size of the company as we are lacking technology innovation activities by smaller organisations with less than 2,000 employees. Could it be that we lack the entrepreneurial mind-set when it comes to technology innovation in Belgium?

IT budgets & priorities: infographic

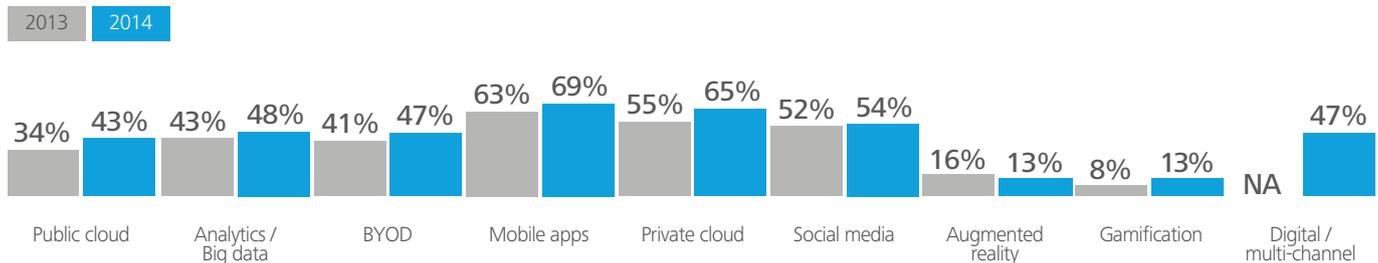
IT budgets Annual shifts



IT priorities In next 12-18 months



Levels of technology adoption 2013 vs. 2014 – Piloting, implementing and adopted



IT budgets & priorities: key findings

Continued scepticism towards specialist technologies

More CIOs are piloting, implementing and have adopted emerging technologies such as mobile apps, social media and big data tools, continuing a trend highlighted in last year's survey.

However, more reported that specialist technologies, such as augmented reality and gamification, are not seen as relevant for their organisations.

Belgium

In Belgium we see that many CIOs have adopted private or public cloud technologies. Similar to the worldwide findings we see that CIOs are piloting and adopting emerging technologies as analytics, Mobile, Digital and Social.

Concerning specialist technologies, one out of two CIO's in Belgium do not think Gamification and Augmented Reality are relevant for their organisation.

Big data and analytics

Almost 50 percent of CIOs are piloting, implementing and have adopted analytics, the survey shows, a change from last year when many respondents said they remained to be convinced of the benefits.

The trend is further evidenced by CIOs selecting analytics as their preferred area of investment if additional budget were available (see focus on analytics in Hot Topics section) showing that CIOs think they aren't spending enough on big data and that they would like to spend more in this space.

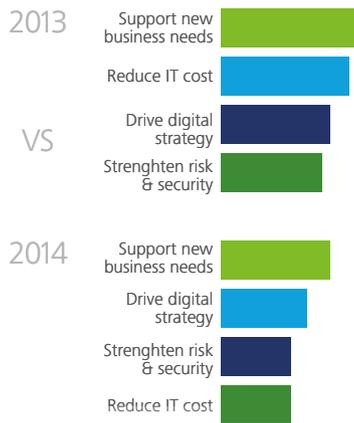
Belgium

For Belgium we confirm the worldwide focus of CIOs on Big Data and analytics. With almost 60 percent of the Belgian CIOs piloting, implementing or adopting analytics and less than 10 percent of them indicating analytics as not being relevant for their company.

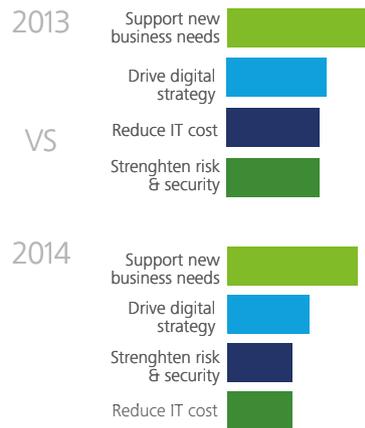
Also for Belgium this adoption of analytics is evidenced by CIO's selecting analytics as their preferred area of investment if they had more budget. Putting analytics in the top 3 investment areas together with Digital/ Multichannel and Private cloud.

IT priorities by industry: infographic

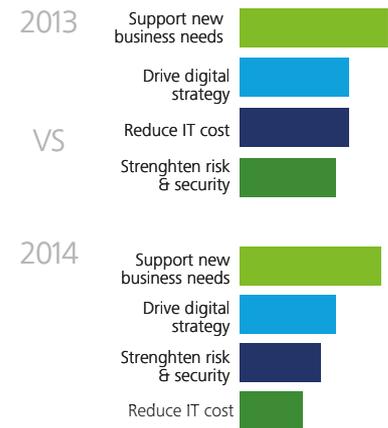
FSI
IT priorities
In next 12-18 months



Private
IT priorities
In next 12-18 months



Public
IT priorities
In next 12-18 months



“We need increased budget to enable greater innovation, adoption of new technologies and engagement of higher skilled and experienced IT staff”

Survey participant, Australia

CIO portfolio: key findings

CIOs prioritise delivery of IT services over growth

CIOs tend to prioritise the delivery of IT services over profit, innovation and growth, the survey shows. For example, CIOs are twice as likely to prioritise IT delivery over “transforming IT from a cost centre to a profit centre” or “investing in new technologies”. This entrenched perspective may act as a restraint on those CIOs looking to pursue growth agendas through their IT portfolios.

More required on strategic portfolio management

In a positive development more than 60 percent of respondents say they evaluate project portfolios against measures such as risk versus reward. Still, despite nearly nine in ten having clarity on their long and short term projects, more than a third do not actively evaluate performance of their portfolios against measures of risk versus reward and around a third do not have the ability to speedily switch priorities and be able to shift their focus based on strategic objectives.

Mind the capability gap

Significant capability gaps may prevent innovation-driven CIOs from managing and assessing their portfolios more effectively, with just one in five having the operational capability to invest in emerging technologies or prioritise transforming their organisations from a cost to profit centre. CIOs also identify capability gaps in respect of monetising data with less than four in 10 having a “mature capability” in that respect.

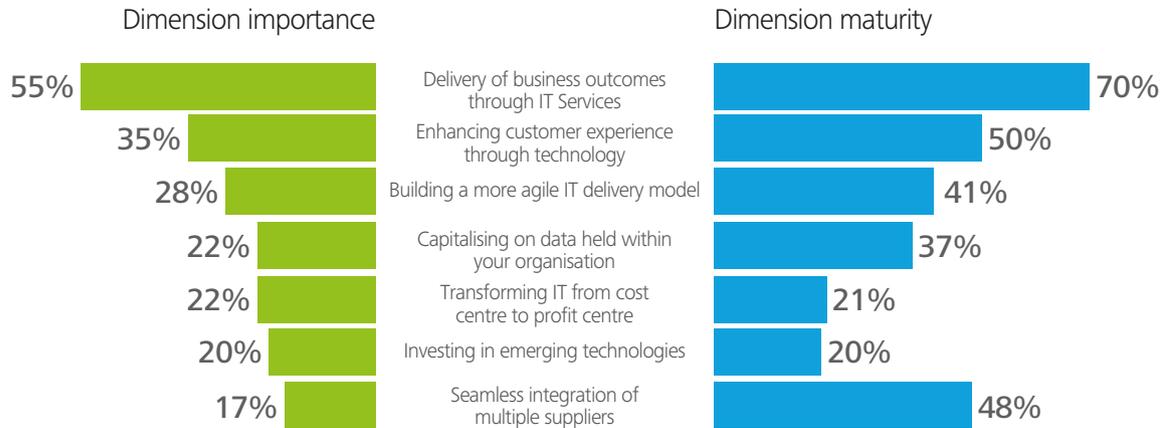
Belgium

For Belgium half of the CIOs report to have significant capability gaps within their IT organisation. This lack of maturity prevents CIOs to invest in emerging technologies and to transform IT from a cost centre to a profit centre.

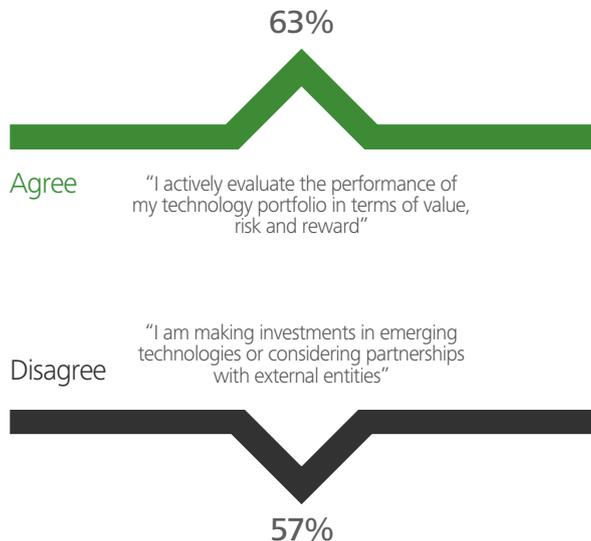
The capability of monetising data held within the business systems appears to be more mature in Belgium. Less than 10 percent of the Belgian CIOs report capability gaps within their organisation.

CIO portfolio: infographic

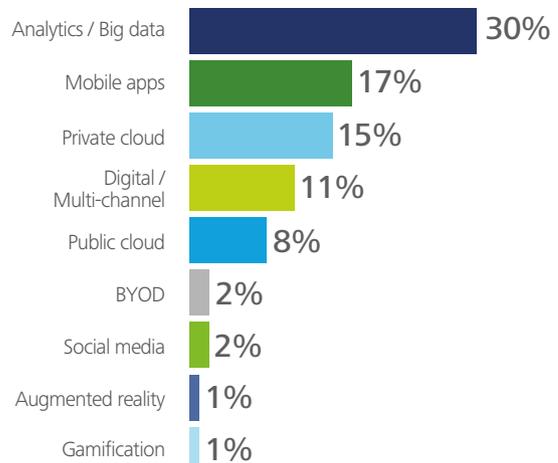
Key dimensions of CIO portfolio



IT portfolio management Key positives and gaps



Where you would invest more money if you had it?



CIO portfolio: insights

Recruit entrepreneurs

IT functions with a focus on innovation should look to recruit entrepreneurial talent. This may be challenging because many IT organisations lack the capability to invest strategically. However, internal business units can be a source of talent, and CIOs should further tap this resource. Marketing and digital functions often contain rich veins of talent and, CIOs take note, may well be the source of future technology leaders.

Monetise IT developed for internal use

For IT functions tasked with innovating to expand revenue streams, it isn't much of a stretch to sell IT systems developed for internal use to customers of their organisations. For example, a leading international organisation that helps biopharmaceutical companies to develop and bring drugs to market faster, easier and more cost-efficiently transformed its IT systems used by internal staff into cloud based services and software. This recently netted the company over \$40 million in new business.

Change what you measure and how you measure it

The success of a portfolio designed to deliver business growth through technology innovation is measured differently to a portfolio designed to deliver IT services aligned to business strategy. Venture capitalists continually assess their portfolios on the basis of risk versus reward, with the ability to rapidly change priorities in response to market conditions. Metrics such as revenue growth, operating margin improvement and shareholder value are useful benchmarks in this context.



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“We need to prioritise and align technology investments into areas that drive real growth and innovation for the business”

Survey participant, South Africa

CIO relationships: key findings

On the right track with some peer level relationships

The survey results suggest that CIOs could do more to enhance their board relationships if they want their IT functions to innovate and support business growth. More positively, slightly more than 40 percent of CIOs report having a very good relationship with CEOs. In a fast paced business environment, where there is constant pressure to demonstrate and support business growth, there is much to be gained from a strong relationship with the CEO.

Belgium

Also in Belgium our survey results suggest that CIOs could do more to enhance their peer relationships as one out of two CIOs does not have a very good relationship with the CEO.

Are CIOs making new friends?

Disruptive trends such as analytics and social media have led to a rise in prominence of roles such as Chief Data, Chief Digital and Chief Marketing Officers. However, the majority of CIOs do not rate their relationship with those stakeholders as particularly strong and they tend to have much better relationships with CEOs, CFOs and COOs.

Belgium

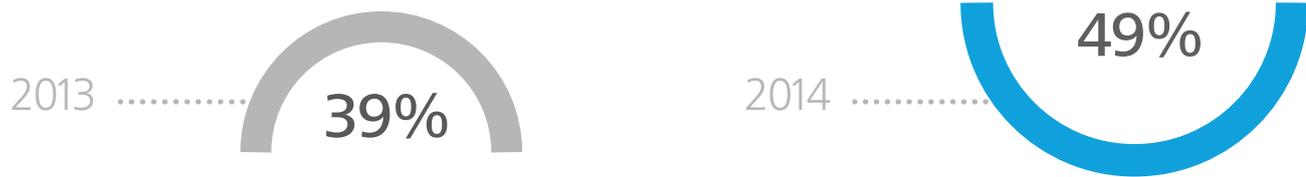
Belgium confirms the worldwide results and also Belgian CIOs seem to lack good relationships with the Chief Marketing Officer

Companies in Belgium do not see the rise in prominence of new business leaders such as Chief Digital Officers and Chief Data Officers. Only 25 percent of CIOs indicate that there is a Chief Data Officer and only 37 percent indicate that there is an Chief Digital Officer.

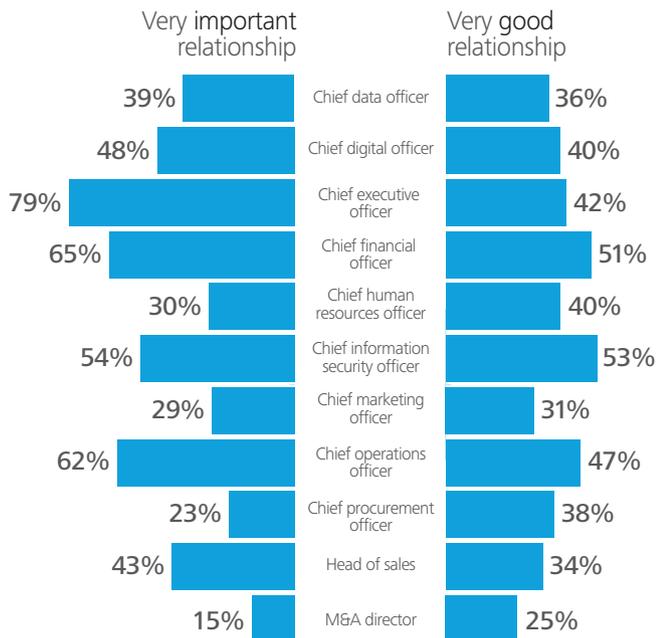
CIO relationships: infographic

IT strategic business partnering:
How effective is your IT function?

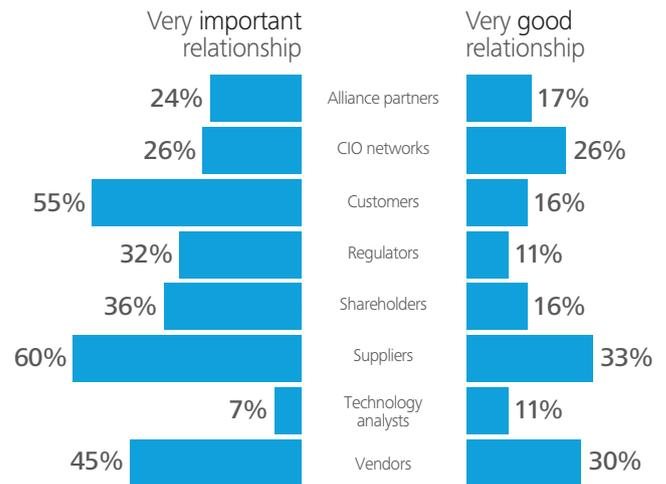
Strong partners to the business



Internal stakeholders
(Perceived importance vs actual strength of the relationship)



External stakeholders
(Perceived importance vs actual strength of the relationship)



CIO relationships: key findings

Improving as business partners - more to do

Although in a better position than last year, CIOs are striving to become leading business partners within their organisations. Just under half of CIOs rate themselves “strong and effective” strategic business partners. That is a step in the right direction, but more needs to be done, and CIOs perhaps remain inhibited by their established role as guardians of the technological status quo.

Belgium

The same tendency is to be seen in Belgium. Here too, just under half of the CIOs rate their function as “strong and effective” business partners.

Whilst the vast majority of CIOs report to the CEO or the board, they lack the dialogue on business outcomes and strategic impact with peer relationships.

Missed opportunities with external stakeholders

CIOs could be doing more to develop networking groups, alliance partners and supplier relationships, with a view to fuelling innovation. CIOs do not currently consider their relationships with alliance partners and technology analysts as very important, and are failing to develop relationships with external customers, where only 16 percent of CIOs report a very good relationship. In addition, just a third claim to have a very good relationship with suppliers and vendors. Taken together these results suggest CIOs are missing opportunities to work with external stakeholders to harness innovation for business growth.

Belgium

Also in Belgium, CIOs are missing opportunities with their external stakeholders, as only 5 percent of CIOs consider having good relationships with alliance partners or technology analysts as very important. Concerning the relationship with vendors and suppliers, in Belgium only 20 percent of CIOs indicate this to be very good.

“If I could change one thing about the business it would be that they would engage with IT naturally when looking into innovation”

Survey participant, Australia

CIO relationships: insights

Refresh relationships

New generation business leadership roles such as chief digital and data officers are gaining prominence. It is becoming essential for CIOs to nurture stronger and trusted relationships with emerging business leaders who champion disruptive trends and CIOs should cement relationships with leaders in these roles and work with them to enable innovation and growth.

Crowdsource, ideate and commercialise

Some CIOs are starting to tap into expertise outside their organisations. For example, a major global oil and gas company recently encouraged regional CIOs to embrace crowdsourcing and third party alliances to develop new revenue streams from existing technologies. Using crowdsourcing to ideate and develop new product lines is a powerful mechanism that may help CIOs develop business opportunities.

Improve C-level influence with stories

IT organisations looking to establish themselves as hubs of technology innovation need to influence their peers on benefits of IT investments. Whether it's a presentation or interactions with internal stakeholders, CIOs should find interesting ways to get their message across. People tend to remember stories and narratives, especially when the message relates to emotions. CIO should use anecdotes and analogies to help people understand complex situations and pass on the information to third parties.



Koen Vandaele

Managing Partner,
EMEA Technology Leader

“The big change needs to be mine. I need to position myself and my department better and more strategically. It is my responsibility to show the company the importance of IT”

Survey participant, Americas

CIO pulse: key findings

Innovation in the IT organisation

For businesses that aspire to grow through technology innovation, there is still work to be done to shift mentalities and embed an innovation culture in the IT organisation. A third of CIOs consider IT innovation as very important to the IT function. More than half of CIOs consider innovation to be important to their organisation, but receive little funding in the IT budget to effectively deliver it. This is an area in which organisations might usefully seek to examine more closely the reasons for lack of investment.

CIO versus business leadership's attitude to risk taking

The survey results suggest that CIOs are willing to take intelligent risks with IT investments, but this attitude does not appear to match with their current portfolio of projects. Business leadership's attitude to risk is the biggest constraint in making riskier IT investments for innovation and growth, CIOs say.

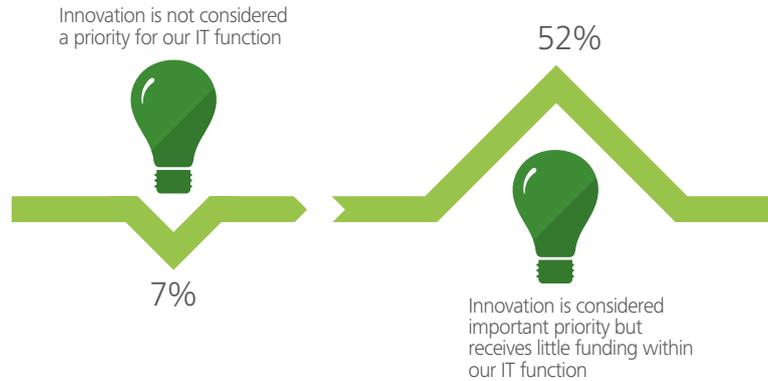
Re-invent behaviour and style

Just under 10 percent of CIOs describe themselves as taking charge of situations, a sharp contrast to the perceived abilities of CEOs and COOs. CIOs also tend to be more rational than intuitive, perhaps indicating that they rely on conscious reasoning rather than gut feeling. This is a positive advantage in many situations, but perhaps less so in innovating for business growth.

Increased self-awareness of personal style and attributes in different business situations may provide CIOs with the best chance to adapt behaviour when dealing with other business leaders and making an impact in the C-suite.

CIO pulse: infographic

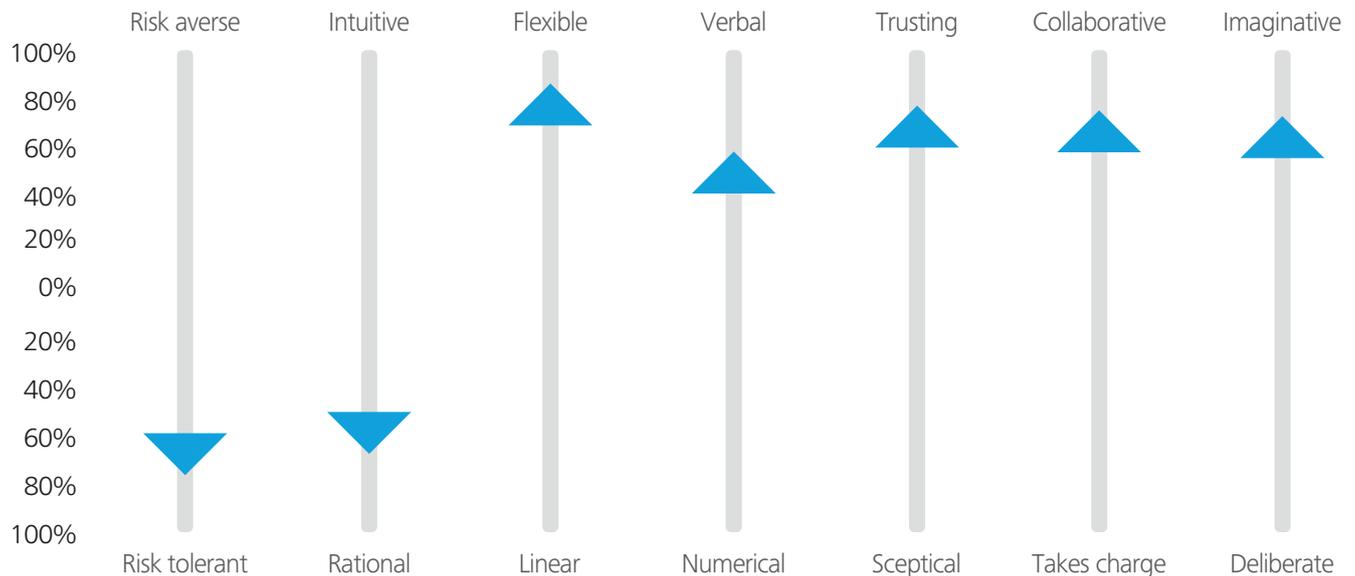
Culture of innovation in your IT organisation



Constraining factors: What's stopping you from making riskier IT investments?



Describe yourself as a CIO: The ends of the spectrum



CIO pulse: insights

Don't bet the business, take intelligent risks

Being bolder with riskier IT investments in disruptive technologies does not mean that CIOs should look to bet the business. Successful venture capitalists hedge their investments to win on net positions. Similarly, CIOs wanting to lead on growth through technological innovation should look to ensure they balance their portfolio of technology investments with the right mix of safe and riskier propositions.

Sharpen your business instincts

CIOs should stay on top of technology trends, their impact and how they might contribute to business growth. That may include educating peers and being perceived as the hub of information on technology-driven innovation and growth. Being at the heart of technology innovation will help sharpen business instincts and identify opportunities.

Be prepared to fail

Successful venture capitalists recognise that not every investment they make will pay off; some may even fail. However, this does not deter them from taking on new investments as part of a risk portfolio. CIOs that want to grow the business through innovation must adopt a similar mentality, within the constraints of their organisations. Reporting to senior business leaders and peers on net business value is one strategy that may help clarify the overall contribution of investments to business value.

Don't forget business as usual

CIOs should not lose sight of keeping the lights on. The majority of the CIO investment portfolio is likely to remain business-as-usual IT services, and outcomes on those investments should not be compromised by innovating for business growth.



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“We need to create a culture that encourages risk taking and tolerance for failure”

Survey participant, Canada

Hot topic – analytics: key findings

Mixed levels of adoption and maturity highlight a need for investment

With businesses using increasing volumes of data for analytics purposes, it is surprising to note that more than 50 percent of CIOs are not piloting, implementing nor adopted analytics in their organisations. The good news is that 74 percent of this group use analytics to support business strategy and almost half see this as giving them a competitive advantage. Still, more than a quarter either don't use analytics or do so in a way that has no clear alignment to business strategy. Organisations are awash with data, but many still make critical decisions based on instinct and expert opinion. The challenge is to marshal, analyse and interpret data and to apply the results to the decision-making process. There is an opportunity for CIOs to take control and build a more streamlined information framework.

Belgium

Big Data and analytics is more widespread in Belgium, with 60 percent of CIOs currently piloting, implementing or adopting analytics within their organisation. 84 percent of CIOs even indicate that they are using analytics to support the business strategy, with almost 70 percent of CIOs seeing this as giving them a competitive advantage. Analytics is clearly more integrated in the Belgian CIO landscape.

The role of the CIO in analytics

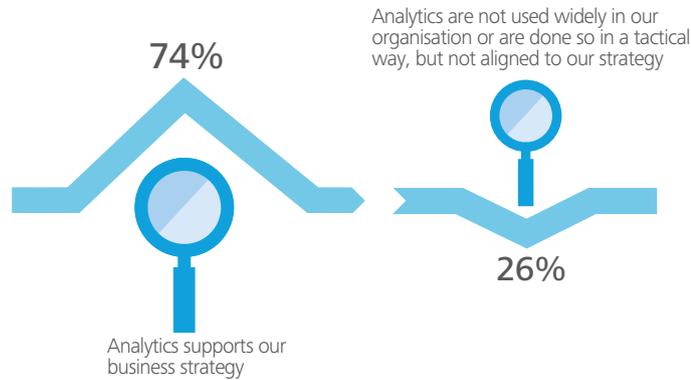
The survey results suggest that the CIO's role in analytics is focused on delivering technology capabilities rather than insight. In addition, more than a fifth of respondents either have limited responsibility for delivering analytics or say their role in delivering analytics is unclear. There is therefore an opportunity to transition the CIO's responsibilities, perhaps to a more holistic insight and information-driven role. The rise in the number of chief data/analytics officers may indicate a trend towards specialisation in this area, but CIOs need at least to recognise and understand their impact.

Belgium

The role of the CIO in the delivery of analytics is clearer in Belgium, with only 4 percent of CIOs indicating that they are unclear about this. Only 8 percent of the CIOs indicate that they have limited or no responsibility in the delivery of analytics.

Hot topic – analytics: infographic

Analytics and business strategy: To what extent do your analytics capabilities support your strategy?*

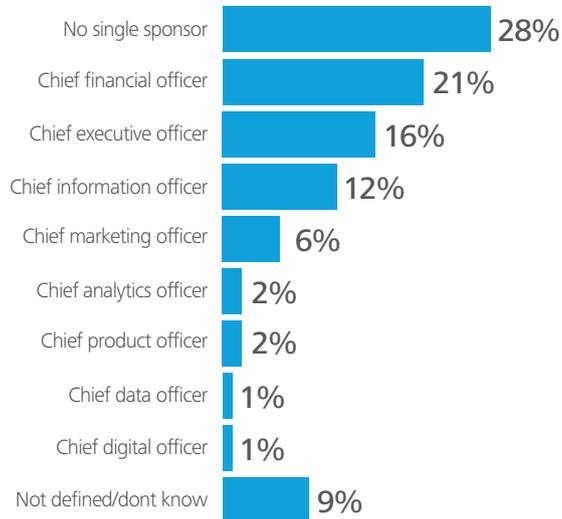


*of respondents who are piloting, implementing or have adopted analytics/big data

CIO's role in analytics: How is your role in delivering analytics capabilities defined?



Executive sponsors for analytics



Hindrances: What is holding back the more widespread use of analytics in your organisation?



Hot topic – analytics: key findings

Confusion over executive sponsorship and ownership

More than a third of CIOs either do not know their executive sponsor for analytics, or claim that no single sponsor is defined. In addition, some respondents indicate that CFOs and CEOs are expropriating ownership of analytics from CIOs. The lack of a single clear sponsor appears to be a key hindrance to widespread adoption within some organisations. For others, the well-publicised analytics talent crunch and a lack of centralised approach to capturing and analysing data are key challenges.

Belgium

Also in Belgium, over a third of CIOs are unclear who their executive sponsor for analytics is, or claim that no single sponsor is defined within their organisations. For the other CIOs, most often the CFO takes up the role as sponsor.

Key challenges and hindrances in Belgium are reported to be the lack of a centralised approach to analytics for 28 percent of the companies, including the well publicised talent crunch for approximately the same amount of organisations. Cyber security and data privacy were never reported as a barrier in Belgium.

Hot topic – analytics: insights

Grab the opportunity

Organisations are awash with data, but many still make critical decisions based on instinct and expert opinion. The challenge is to marshal, analyse and interpret data and to apply the results to the decision-making process. There is an opportunity for CIOs to take control and build a more streamlined information framework.

Align interests of stakeholders

CIOs are uniquely positioned to act as central hubs in aligning analytics strategy with the business. Lack of a coherent approach to analytics isn't a data or a technology issue; it's a strategic, people and process issue, and CIOs manage a diverse set of stakeholders and are therefore well-positioned to bring together diverse actors to generate optimal solutions.

Find a sponsor

CIOs need to establish a vision for realising analytics at the heart of their organisations, based on an illustration of how value may be generated. Executive-level sponsorship and an achievable roadmap will provide short-term, targeted insight and support long-term transformation.

Invest in “purple people”

In the world of analytics, data technologists are denoted by the colour red and business functions by blue. Staff members who are a blend of both are “purple people”, and they are critical to the success of analytics, which requires a dual understanding of technology and business strategy. Business processes constantly evolve and “purple people” are equipped to help organisations adopt analytics to respond to change. Organisations must identify and invest in these types of people to succeed in analytics.



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Regional variations

Canada

More likely to...

- consider themselves as 'intuitive' CIOs
- have a clear line of sight across all the portfolio of IT projects & programmes
- have adopted or are implementing private cloud solutions

Least likely to...

- actively evaluate the performance of their technology portfolio in terms of value, risk & reward

Latin America

More likely to...

- have transformed IT from cost centre to profit centre
- believe that, although analytics support their strategy, provide no competitive advantage
- focus on strengthening risk and security management

Least likely to...

- encounter privacy issues hindering the more widespread use of analytics

Western Europe

More likely to...

- have adopted, implementing or piloting analytics
- rate 'enhancing the customer experience through technology' as an important dimension of their work
- have adopted BYOD

Least likely to...

- consider innovation as a top priority for the IT function

Northern Europe

More likely to...

- consider themselves as 'risk tolerant' CIOs
- have transformed IT from cost centre to profit centre
- have seen an increase in their IT budget

Least likely to...

- lack proper technology and infrastructure to capture the data to deliver analytics

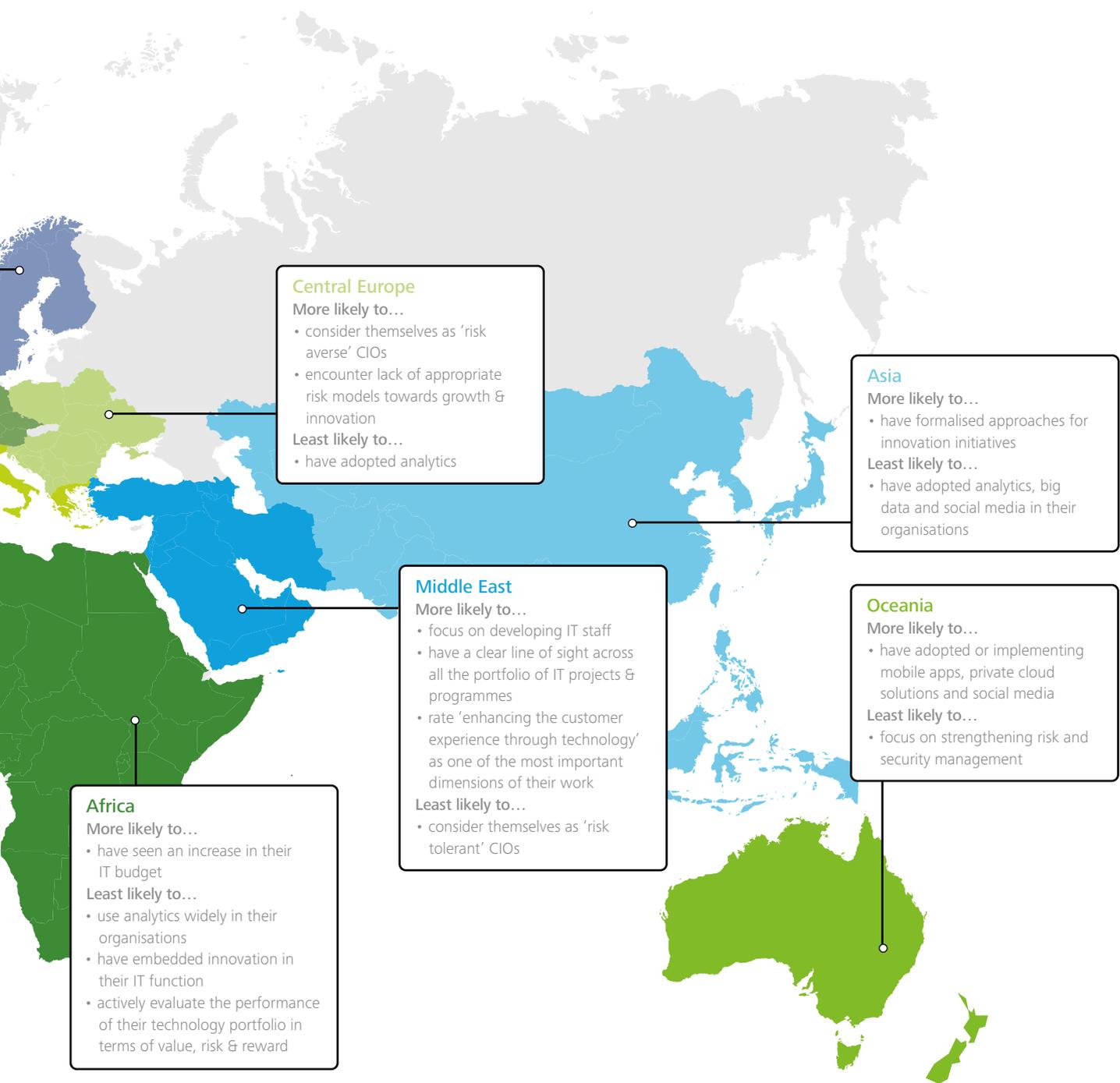
Southern Europe

More likely to...

- encounter lack of appropriate risk models towards growth & innovation
- consider transforming IT from a cost centre to a profit centre as one of the most important dimensions of their work

Least likely to...

- believe that analytics and big data provide a competitive advantage



Central Europe
 More likely to...
 • consider themselves as 'risk averse' CIOs
 • encounter lack of appropriate risk models towards growth & innovation
 Least likely to...
 • have adopted analytics

Asia
 More likely to...
 • have formalised approaches for innovation initiatives
 Least likely to...
 • have adopted analytics, big data and social media in their organisations

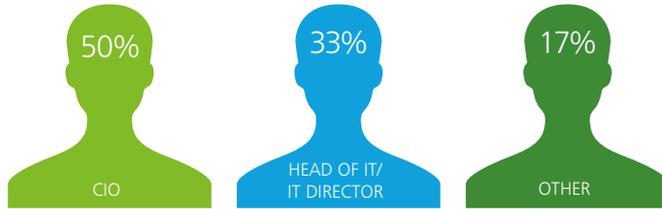
Middle East
 More likely to...
 • focus on developing IT staff
 • have a clear line of sight across all the portfolio of IT projects & programmes
 • rate 'enhancing the customer experience through technology' as one of the most important dimensions of their work
 Least likely to...
 • consider themselves as 'risk tolerant' CIOs

Oceania
 More likely to...
 • have adopted or implementing mobile apps, private cloud solutions and social media
 Least likely to...
 • focus on strengthening risk and security management

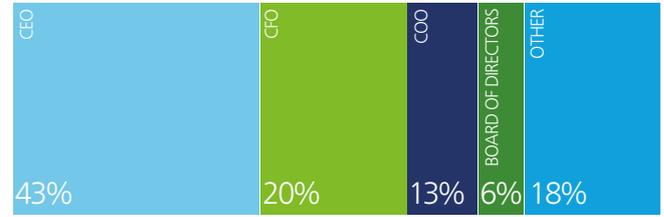
Africa
 More likely to...
 • have seen an increase in their IT budget
 Least likely to...
 • use analytics widely in their organisations
 • have embedded innovation in their IT function
 • actively evaluate the performance of their technology portfolio in terms of value, risk & reward

About the participants

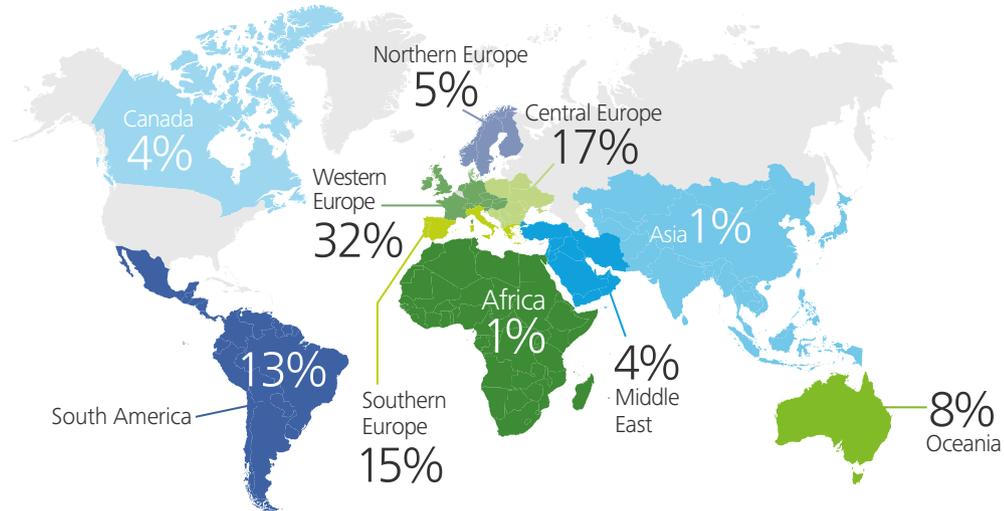
Job title



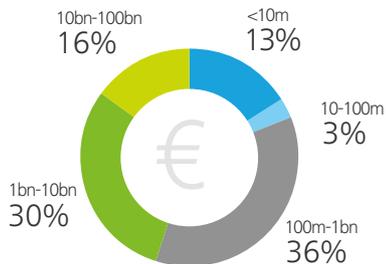
Reporting to



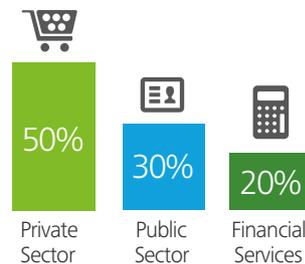
Regions



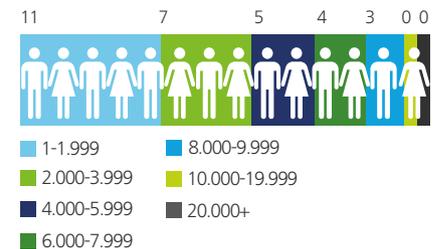
Company revenue



Industry



Number of full-time employees across company (%)



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