

Welcome



Welcome to the Deloitte CIO Survey 2013 findings. Join us for a look back to last year's findings to discover what is on the agenda of over 700 CIOs and other IT leaders from 36 countries across the Americas, Europe, the Middle East, Africa, Asia and Australia. The CIO Survey 2013 is a truly international outlook aiming to provide insight into the opportunities and challenges, which CIOs across industries and geographies are faced with as they continue to establish themselves with their executive management teams – as respected technology as well as business leaders.

While the results vary somewhat between regions and industries, what is most striking is the consistency in the issues faced by CIOs across the world. This should offer some comfort to IT leaders reading this report as they navigate their way through an ever more challenging and fast changing business environment.

This report presents the highlights from the Deloitte CIO Survey 2013. Within each chapter you will find:

- A summary of the key insights across all respondents internationally
- A section dedicated to the Danish responses collected in addition to the global survey
- Observations and practical tips from Deloitte specialists to help tackle some of the key challenges cited.

We hope you will 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 to the Deloitte CIO Survey 2013, thank you for your time and insight. We look forward to continuing the dialogue with you.

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Executive summary

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The results of our survey suggest that the worst of IT budget cuts are behind us, with less than a quarter of CIOs reporting a budget decrease this year. While this is welcome, it is clear that CIOs are operating in an extremely challenging environment – one characterised by ever-increasing business expectations, rapid increases in the pace of business and technological change, shrinking technology adoption lifecycles and a shortage of available talent. The role of the CIO as a trusted partner to the business, in what for many parts of the world remain difficult economic times, has never been more important or challenging.

How are CIOs responding to this challenge? Firstly, they are developing and maturing their business partnering function. The results provide overwhelming evidence that CIOs feel there is more to be done to establish themselves as highly effective business partners. Building a dedicated business partnering function is one of the most powerful tools at the CIO's disposal as they seek to change the nature of their relationship with the business.

Secondly, they are seeking to drive the innovation agenda. The majority of CIOs recognise that IT has an essential role to play in this space yet only 35% believe their IT function is considered a credible hub of innovation within their business. The survey points to a number of areas where the IT function could consider providing additional focus in order to deliver more in innovation terms to help support business growth and competitiveness. Finally, CIOs are addressing their talent shortage. Our results tell us that recruitment and retention of talent, with the right skills to support new business demands, is a significant issue for CIOs. People who can really understand the business, think strategically and communicate effectively are those in most demand. The challenge for the CIO is that these are exactly the areas in which they are having most difficulty recruiting staff.

From the actions they are taking, it is clear that CIOs want to make a more strategic impact on their organisations. Our survey suggests that roles that provide them with the opportunity to do this are exactly what they are looking for. CIOs indicated that being able to make a greater contribution to the business strategy and a 'new challenge' are key reasons to consider a career move. A third of CIOs indicated that they do not find their career entirely fulfilling. Taken together, these results surely represent a missed opportunity for both CIOs and their peers in the business. This should give pause for thought to Boards and business executives – are they getting the best out of their IT leaders in terms of the contribution they can make inside and outside of the C-suite? Equally, CIOs should consider the role they can play in proactively making this happen.

IT BUDGETS ANNUAL SHIFTS

78% INCREASED OR THE SAME



22% DECREASED

BUSINESS PARTNERING IT EFFECTIVENESS

61% RATED "FAIR" OR "POOR" PARTNERS TO THE BUSINESS



SUPPORTING INNOVATION THROUGH TECHNOLOGY



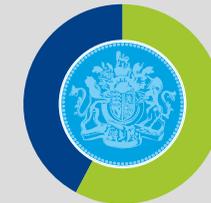
75% OF IT LEADERS UNDERSTAND HOW THEY CAN SUPPORT BUSINESS INNOVATION

35% OF IT LEADERS BELIEVE THEIR FUNCTION IS CONSIDERED A HUB OF INNOVATION



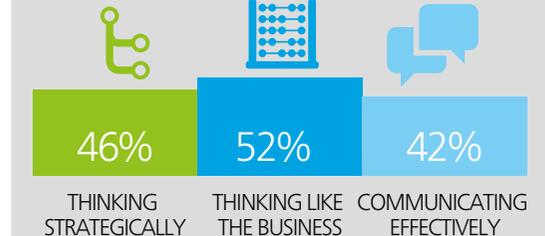
IT PRIORITIES BUDGET ALLOCATION

42% CHANGE AND GROWTH

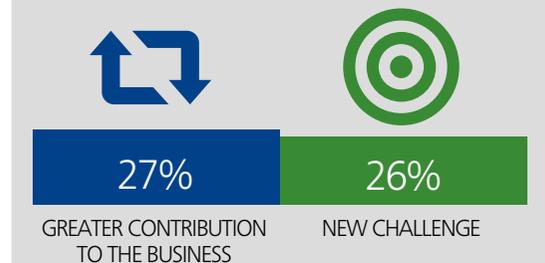


58% BUSINESS AS USUAL

TALENT BUSINESS SKILLS GAPS



CIO CAREER TOP REASONS TO MOVE ON



IT BUDGETS & PRIORITIES ►

IT budgets & priorities Key findings

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On the up

Our survey results suggest that business investment in IT is on the rise with only 22% of total respondents reporting a budget decrease from the previous year. This is reflective of most geographies and industries, with the only notable exception in the Public Sector where over a third of CIOs experienced a decrease in IT budgets this year.

Growth and change vs business as usual

So what are CIOs spending their money on? Our respondents reported that almost 60% of their IT budgets are being allocated to “business as usual” activities and the remainder to support business growth and change. While this is still a significant proportion earmarked to “keeping the lights on”, it represents a move in the right direction for those IT functions with an appetite to drive growth and change.

When asked about budget priorities, in excess of 80% of CIOs indicated that responding to new business needs is their primary focus this year. Driving digital strategy through new technologies and trends such as mobile, cloud, social media and analytics is seen as the next highest priority for over 50% of respondents. This is perhaps a reflection of the reported upkeep/increase in IT budgets and indicates a renewed focus on driving change and innovation agendas.

Operating models and sourcing

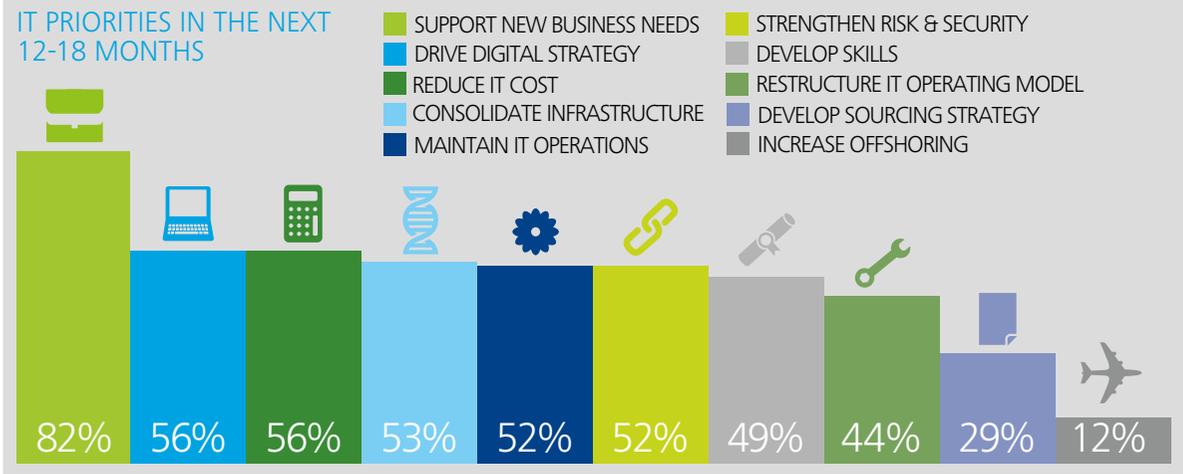
In order to respond to new business needs, CIOs are not placing a high importance on re-structuring operating models or re-considering how they source new capability from their external suppliers. IT leaders might be missing a trick here to develop and maintain sustainable capability which is responsive to shifting business needs.

What is clear from our survey is that developing and delivering new capabilities to meet changing business requirements is the highest priority for CIOs. But are they up to the job? Are they considered a credible candidate? And can they effectively partner with the business to deliver transformational change?

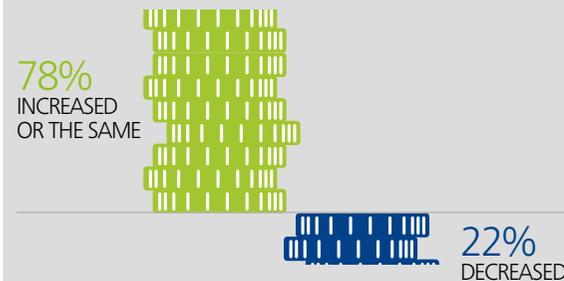
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IT PRIORITIES IN THE NEXT 12-18 MONTHS



IT BUDGETS ANNUAL SHIFTS



BUDGET ALLOCATION BUSINESS AS USUAL VS. CHANGE & GROWTH



Business partnering Key findings

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Raising the game

Our survey reveals that IT leaders recognise the need to be an effective business partner and that opportunities exist for IT to add more value to the business in which they operate. For example, almost 70% of those surveyed believe they can make the biggest difference within their organisation by enabling business strategy. However, our CIOs acknowledge that they still have some way to go to improve their reputation as a credible partner to the business. This was highlighted by the 61% of respondents who rated their existing business partnering capabilities as either fair or poor, only collaborating with other business areas to add strategic value from time-to-time, or not at all. So what is stopping CIOs from being consistently effective business partners?

Service provider or business partner?

A significant proportion of CIOs still see their team's greatest asset as delivering routine IT services, with 89% rating their effectiveness in this space as either meeting or exceeding expectations. At the same time, they recognise more needs to be done in areas which help facilitate business change, in particular, improving their team's capacity to provide high quality data and insight, and optimising new business processes. If CIOs themselves feel their 'sweet spot' is in the delivery of routine services, then it will be difficult for their stakeholders to view them any differently.

Business perception

When asked to identify the top barriers to effective IT business partnering, CIOs cited a lack of business understanding and a poor perception of the role of the IT function as the main reasons. The second most common barrier is seen as conflicting IT priorities and a lack of resources to support a dedicated IT business partnering strategy. Our chapter on *Talent* explores how significant capability gaps in terms of business facing skills within IT organisations could be contributing to both business perception and resulting resource issues.

All is not doom and gloom

A positive finding from our survey is that establishing a dedicated business partnering function seems to be giving CIOs the best chance of achieving excellence as a strategic partner, suggesting that more focus in this area is likely to yield better results. Of those respondents who rated their IT function as an 'excellent' strategic business partner, 65% already have a dedicated business partnering function in place. Tellingly, of those that rated themselves as "poor" partners to the business, 88% have not yet formalised this capability within their teams.

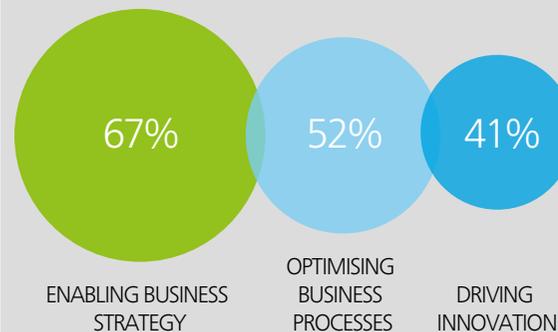
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IT VALUE DRIVERS TOP WAYS BUSINESS LEADERS EXPECT IT TO ADD VALUE



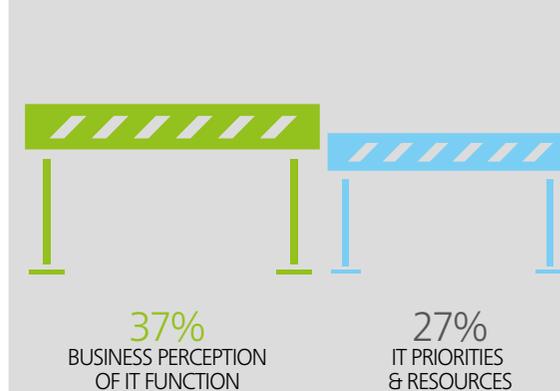
STRENGTHS & WEAKNESSES DRIVING BUSINESS VALUE



IT BUSINESS PARTNERING EFFECTIVENESS



BARRIERS TO BUSINESS PARTNERING FACED BY IT LEADERS



BUSINESS PARTNERING: QUICK WINS ►

Business partnering Quick wins

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What can IT leaders do to get closer to the strategic hub of their organisation and become a more effective business partner?

Strengthen your internal network

As businesses continue to digitise and expenditure on technology outside the IT function increases, the need for IT leaders to build and nurture relationships across their organisations becomes crucial. A good place to start is by identifying the most important relationships that will help you and your IT function progress – whether they are with business leaders to collaborate on strategy, fellow officers to help you gain greater access to board members, or customer-facing staff to service end users.

Make it personal

Successful CIOs proactively understand their business partners' objectives and views on technology, and use this knowledge to help establish common incentives and goals for greater collaboration. For example, finding ways to deliver real-time business data to the Finance Director; helping Sales & Marketing to invest in the right technologies for interacting with customers; or helping the COO achieve further operational efficiencies through technology.

Talk business

Adopt and embed within your teams the use of business-friendly language. For example, when talking with the CFO, put technology requests in business terms – know how to calculate the business return on investment, articulate the total cost per unit per IT service, and question every cost. Remember, your colleagues don't care about cloud, ERP or big data. They care about financial reporting, sales cycles, customer satisfaction, capacity issues, supply chains and the other things that consume their time and attention.

Demonstrate "inside out" business understanding

When you secure that seat at the Boardroom table, make sure you use it well. Build a strong working knowledge of your organisation's goals and objectives and be able to articulate the role technology can play in achieving them. Put yourself forward to play a leading role in a major transformation project and demonstrate first-hand how technology can really drive business change.

Build your army

The trick now is for IT leaders to really commit to this new way of thinking – one which involves proactively generating ideas, acting as an information broker by providing insights to support business decisions, and delivering business transformation by introducing new business model innovations. This means continuing to identify and invest in multi-faceted, future-focussed team members who not only understand complex technologies but also how they can enable business objectives.

“Engaging the business and helping them to fully understand the value of IT as a business partner is a real challenge.”

Survey participant, Malaysia



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Talent Key findings

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The talent gap is in business-facing skills

Responses to the Talent section of our survey suggest that many CIOs are still struggling to find the right blend of technology expertise and business skills to support business demands. Over half of CIOs are experiencing difficulties sourcing staff that can think like the business, while just under half are struggling to find professionals that can think strategically and communicate effectively. Our *Business Partnering* findings suggest that this talent gap is also seriously impacting the effectiveness of CIOs as business partners.

Wanted: business-centric technical skills

In terms of technical skills, the top areas CIOs identified as in need of improvement were equally business-focussed and strategic in nature. 42% of CIOs are demanding more in terms of business analysis skills, for example, team members capable of identifying business needs and delivering technology solutions to business problems. Around a third of CIOs are also experiencing shortages of skills within their teams in delivering technology strategy and architecture, and analytics and big data.

Getting creative with talent attraction

This continued shortage of talent in business-centric roles within the IT function seems to be due in part to a lack of experienced staff in the market, according to respondents across the majority of regions. However, many IT leaders are adopting increasingly creative tactics to attract and retain this new breed of professional into their organisations. Over 40% of respondents are redesigning IT roles and structures and/or providing access to cutting edge IT projects, possibly reflecting a growing realisation that IT leaders need to start making a role in IT a much more attractive career choice. These responses outweighed traditional strategies such as paying above the market rate, and providing better work/life balance opportunities.

Missing an opportunity?

Only 12% of CIOs are offering opportunities on projects outside the IT function as a mechanism to attract and retain talent. We believe IT leaders are missing a chance to get closer to the business by not placing a greater emphasis on encouraging teams to build relationships and foster better links with other business functions.

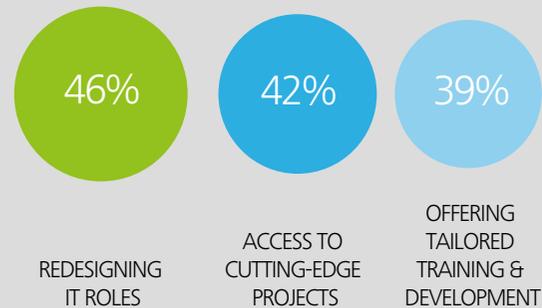
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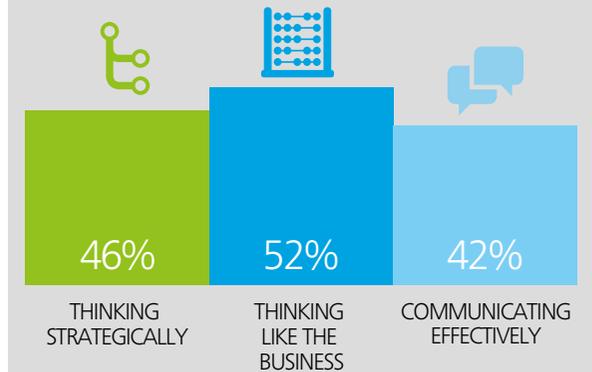
RECRUITING & RETAINING TALENT TOP TACTICS



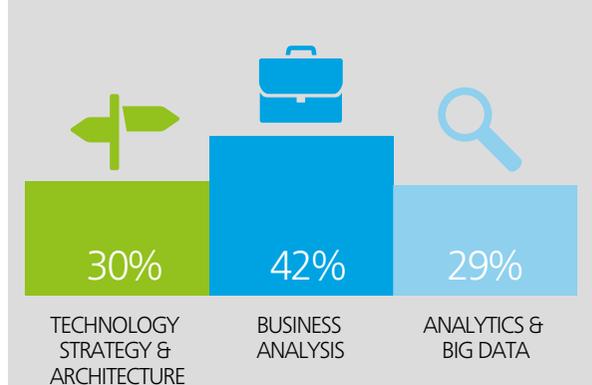
RECRUITMENT CHALLENGES



BUSINESS SKILLS GAPS TOP THREE WITHIN IT FUNCTIONS



TECHNICAL SKILLS GAPS TOP THREE WITHIN IT FUNCTIONS



TALENT: QUICK WINS ▶

Talent Quick wins

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What changes can IT leaders make in order to up-skill their teams and attract the right talent?

Technical skills as pre-requisites not differentiators

IT organisations require a “breed” of technologists who are able to demonstrate competencies such as thinking like the customer, maintaining relationships, applying strategic thinking, being innovative and having razor-sharp focus on continuous improvement. IT talent which excels in these areas is more likely to differentiate your business. Revamp your focus on IT talent management from being skills-focussed to behaviour/competency-focussed.

Bolster your training curriculum

Consider formalising non-technical training pathways together with your technical curriculum. Identify training programmes which address dealing with ambiguity, complex stakeholder management and effective communication to complement technical learning pathways.

Don't shirk from recruiting non-technical resources

Challenge the status-quo in your organisation and don't hesitate to recruit and on-board non-technical resources into your IT organisation. Broaden your search criteria to include candidates with demonstrable experience of creative-problem solving and innovation. Not only can such recruits help kick the tyres on current ways of thinking, but they can also bring with them new perspectives and valuable business contacts.

Make room for exciting projects in your portfolio

Seek opportunities to deploy your staff on new and challenging projects within the organisation. Such projects usually provide exposure to more business-focussed activities and also provide contact with more senior business stakeholders. This keeps the workplace fresh and exciting for technical staff and also provides an opportunity to learn “soft skills” on the job.

Take a punt on encouraging external contact

Social network and mobility are expanding personal networks more than ever. Businesses are increasingly harnessing the power of “crowd-sourcing”. Encourage your staff to become members of online communities and projects. The next big thing to differentiate your business might be born in a community created or contributed to by a member of your team.

Think, act, do business

Develop and embed ways of working which demonstrate ownership of business outcomes by the IT organisation. Set objectives and monitor performance of IT staff on business outcomes. Reward IT staff on their ability to deliver business outcomes and ensure success is communicated to other teams within the organisation.

“Personal development and opportunities outside of the IT function are key to attracting and retaining the right talent.”

Survey participant, UK



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The business needs IT innovation

Technology-driven innovation is fast becoming a key lever for organisations to realise competitive advantage, a message re-inforced by the fact that almost two-thirds of CIOs confirmed that innovation is a key part of their organisation's business strategy. Three-quarters also stated they have a clear understanding of how their IT function could support their organisation's innovation strategy, citing operational efficiency, market development, and product /service differentiation as being the top three ways that innovative technologies could add the most business value.

IT is not yet delivering on its innovation potential

Despite these perceived opportunities, 65% of CIOs do not believe that their IT function is considered a credible hub of innovation within their organisation. Almost half of all respondents claim that IT priorities, resources and budget constraints are the key barriers preventing them from effectively supporting their business's innovation agenda. A further proportion of IT leaders see opposing strategic priorities and a lack of understanding of IT within the business as obstructing the progress of IT innovation. Many of these are consistent with the top barriers CIOs feel are preventing them from becoming effective business partners.

Innovative technologies

Despite emerging technologies promising a transformational and disruptive effect on the business, our survey results suggest that many IT leaders are still only just starting to leverage their potential to support their innovation agenda. Highest adoption rates are being seen across mobile, private cloud and social media, however these technologies are still only being implemented or fully operational within around 30-40% of respondent IT functions. At the same time another 40-50% have still not moved beyond researching these rapidly evolving technologies, indicating that there is still significant potential to be unlocked.

Big data, big gap

Big data is fast becoming a key strategic asset in many organisations. Despite this, over half of respondents are still at a very early stage of the adoption curve with 64% of respondents still only monitoring or researching these technologies. It appears that many CIOs remain to be fully convinced of the benefits that big data and Analytics can bring to their businesses.

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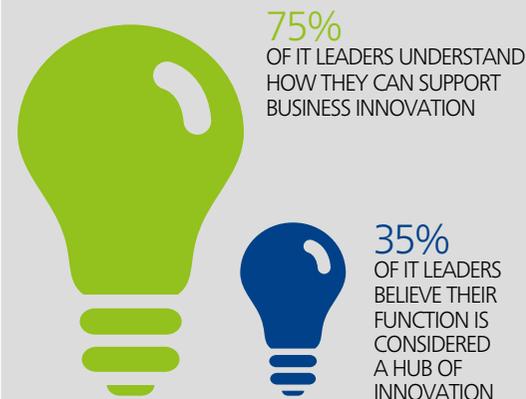
BUSINESS VALUE THROUGH TECHNOLOGY



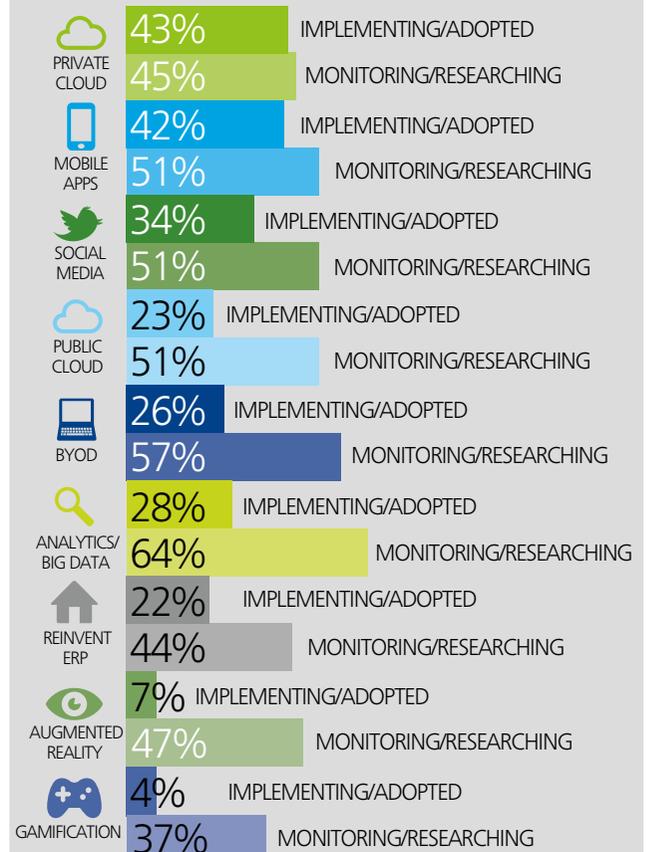
INNOVATION BARRIERS FACED BY IT LEADERS



SUPPORTING INNOVATION THROUGH TECHNOLOGY



TECHNOLOGIES & TRENDS LEVELS OF ADOPTION



INNOVATION: QUICK WINS ►

Innovation Quick wins

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What steps can CIOs take to start building a culture of innovation within their IT functions and really drive business change and growth through technology?

Get in the driving seat

At a time when technology is the key force driving business innovation, IT leaders have never been in a better position to play a central role in developing the business for change and growth. Leading CIOs are identifying key ways to leverage the latest technology forces and trends to drive new business capabilities and are able to clearly articulate how this investment will create business value. For example, consider ways to demonstrate how mobile can help reshape your organisation's customer, employee and supplier experiences, or how combining analytics, mobile and social media can provide your business leaders with insights that can improve decision-making.

Big (data) opportunity

If your IT budgets and resources constrain you to focus on just one area of innovation this year, consider getting a firmer grip on big data and analytics. Helping to make sense of the vast quantity of data within your organisation to aid decision-making will very quickly put you in the running for Board-level attention. Begin by exploring a specific domain, such as customer base, product or pricing, and identify practical entry points to big datasets that are digestible in scope and can enrich current analytics. Start small, delivering something quickly before the business loses interest.

Innovation connections

Get closer to your wider business and supplier network to help you shape your innovation strategy. Call upon your Chief Operating Officer to understand how technology can innovate existing business models; spend time with Marketing and Product Development to improve your grasp on market and customer trends; and make use of your CFO's commercial focus and board-level connections to help design a business case for your innovation plan. And don't forget your external vendors and business partners can also be a valuable source of innovative input – invite them to share real examples of how they have delivered innovation, either within their business or for clients, which demonstrate tangible business outcomes.

The new norm

Instil a culture of innovation within your IT function by encouraging your staff to challenge current thinking and giving people the space and time to develop new ideas. Incorporate innovation responsibilities into job descriptions and objectives, and visibly reward staff for their innovative contributions. And don't forget to set aside some budget to invest in the right initiatives that will not only help grow your business but also help build your function's reputation as innovators within your organisation.

Shake up your recruitment process

If you're serious about putting innovation at the core of your IT function, then it also needs to be at the core of your recruitment strategy. Invite your recruitment team to help design a hiring process that really reflects the culture you are trying to build within your IT function and the type of innovative talent you are looking to attract. From fresh advertising and job descriptions that excite and inspire, to interview questions that encourage candidates to demonstrate their passion and flair for innovation.

“The top management do not see IT as a strategic tool for innovation and transformation.”

Survey participant, Finland



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CIO CAREER ▶

CIO career Key findings

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Appetite for more business impact

It is clear from the survey that IT leaders want to have a more strategic impact on their organisations than they currently do, with the top motivation for a career move being a desire to make a greater contribution to business strategy. They believe that enabling the business strategy is the top way that their business stakeholders expect them to add business value. This suggests that IT leaders are clear on where their priorities need to be, but do not feel they are currently in a position to deliver against this in their current organisation. This clearly indicates that many organisations are not getting the best out of their IT leaders in terms of the contribution they can make in the C-suite and indeed risk losing them altogether.

A fulfilling career?

Our survey demonstrates that the role of the IT leader is not necessarily one of short tenure. 69% of respondents have been in their current role for more than 3 years, and 40% have been in the role for more than 6 years. However, one-third of respondents do not agree that their role as an IT leader gives them a range of job opportunities for a varied and fulfilling career. This perhaps indicates frustrations amongst CIOs, who recognise there are opportunities to add value but are constrained to deliver on their potential.

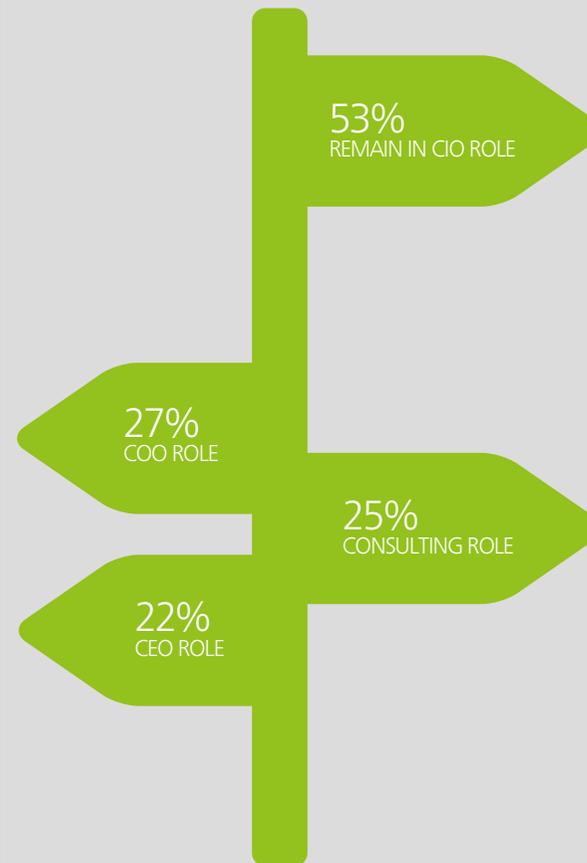
Business-focussed career move

The idea of IT leaders moving to a career outside of IT may have been unlikely in the past, but our survey shows that attitudes and aspirations on this are starting to change. Although approximately half of respondents felt they would most likely remain in an IT leadership role for their next career move, many are still attracted and aspire to new and even more senior roles in the executive management team – most notably the COO or CEO – in their quest for a new challenge and a greater influence, contribution, and impact on the business strategy.

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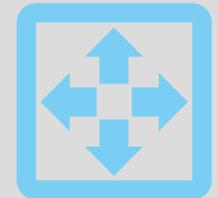
WHERE NEXT CIO CAREER CONSIDERATIONS



JOB SATISFACTION TRAINING & CAREER OPPORTUNITIES

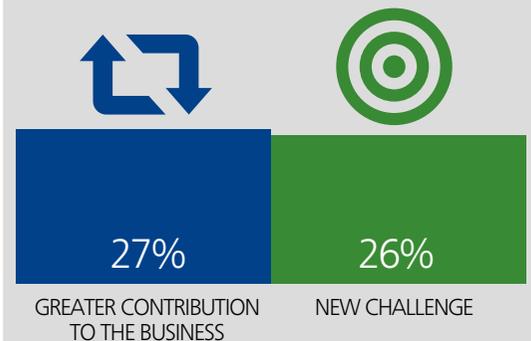


34%
OF IT LEADERS DO NOT AGREE THAT THEY HAVE ACCESS TO ADEQUATE TRAINING AND DEVELOPMENT



33%
OF IT LEADERS DO NOT AGREE THAT THEY HAVE ACCESS TO OPPORTUNITIES FOR A FULFILLING CAREER

CAREER MOVES TOP REASONS TO MOVE ON



CIO career Quick wins

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What can CIOs be doing to remain fulfilled in their roles and give themselves the best opportunities to meet their career aspirations?

Four faces of the CIO

The CIO's remit in business today is far-wider reaching and higher up on the Boardroom agenda than ever before. In order to establish yourself as a credible player within the executive management team, it's vital that you master the art of situational leadership. This means balancing your multi-faceted role as a technologist, operator, strategist and catalyst and being able to identify the right "face" to bring to the table depending on the situation at hand. Although this can be hugely challenging, get it right and it can also be hugely rewarding.

Building the next generation of CIOs

Planning for your own succession by building a management team that support your vision for the company will give you the best opportunity to evolve as a business leader – either within your IT function or as part of the wider executive management team. Identify your next generation of CIOs and provide them with stretch opportunities which not only help to mould them into your shoes, but which also free up your time so you can engage in bigger picture dialogue with the rest of the business.

Broaden your experience

More and more CIOs are emerging with direct experience of a business function, rather than with a traditional IT background, so these are some of the likely candidates that you'll be up against at your next career move. Put yourself in the best position to compete with these individuals by gaining experience in other parts of your business. Consider for example how technology can play a more influential role in areas such as operations, finance, M&A, product development and marketing. This exposure will serve you well if in the future you decide to look beyond the traditional CIO career path. Also make time to see what is happening externally. It's not enough to just be well-read on the latest external publications – it's crucial to interact with other CIOs to bring back new ideas that will be valuable to your business.

“A seat on the Board is the one thing that would attract me to a new role.”

Survey participant, UK



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THE CASE OF DENMARK ▶

The case of Denmark Key findings

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In addition to the international survey, Danish IT organisations were asked to rate their own performance as well as their expectations for the future. The results are presented on the following slides.

General confidence in the performance of Danish IT organisations

The majority of Danish IT organisations across industries have a general confidence in their own performance. On average, 81% reply that they meet or exceed expectations across the seven main themes of the IT organisation. Especially introducing new and modified services in a planned, controlled and timely manner to minimise disruptions to live services is an area where the organisations are over-performing.

In general, the survey shows a split between the perceived high-performing IT organisations, positive along most of the categories, and the low-performing IT organisations responding that they need to improve in a variety of areas. This indicates that some Danish CIOs consistently evaluate their own performance highly, whereas the more critical CIOs recurrently rate their performance low.

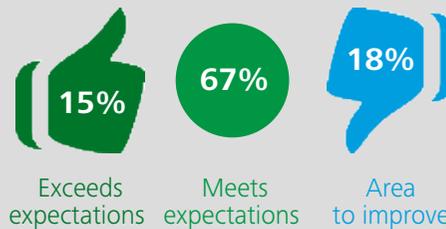
Vendor management is identified as an improvement area

Our survey demonstrates that approximately 35% of the Danish IT organisations feel that they could improve their supplier relationships and how they manage and control vendor performance – the largest number in the survey. 45% believe that they are meeting expectations, whereas 20% are exceeding expectations.”

Meeting customer demands is an area to improve in the years to come

Again, we see a split in how Danish IT organisations perceive their own performance. On average, 80% of the respondents believe that the business leader will rate the IT function as meeting or exceeding expectations in both operational stability, stable and high-level customer satisfaction and stable and high-level end-user satisfaction. 18% believe that this is an area for improvement. One of the results that stand out is that 95% of the surveyed Danish IT organisations do not believe that they exceed expectations in identifying, understanding and managing customer demands.

RATING OF THE IT FUNCTION HOW DOES IT EXPECT BUSINESS LEADERS TO RATE THE IT FUNCTION?

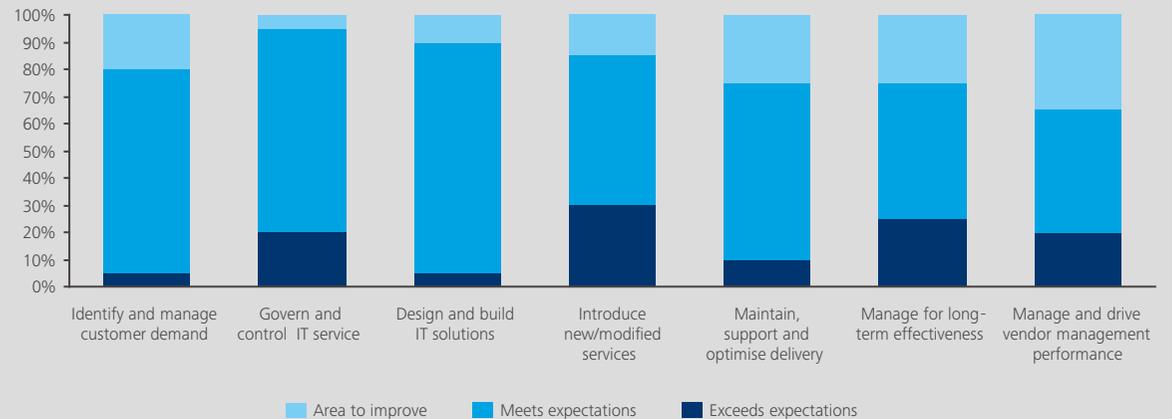


CUSTOMER DEMANDS THE IT FUNCTION'S EFFECTIVENESS IN MEETING CUSTOMER DEMANDS



20/80 DIVISION

On average, approximately 20% of Danish IT organisations believe they are exceeding expectations across all questions in the survey, whereas 80% are either just meeting expectations or feel they have areas to improve.



The case of Denmark Key findings

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Outsourcing of IT is widespread and going strong

The focus on IT cost savings has meant an increased use of outsourcing for the IT organisation. 95% of the Danish IT organisations surveyed are outsourcing one or more parts of their IT. Especially data centre operation is a popular outsourcing subject (71% are currently outsourcing their data centre operations). Compared to other organisational units, IT is by far the most outsourced unit. Furthermore, IT is the area that Danish IT organisations are most likely to outsource within the next two years. This tendency shows that IT outsourcing is still the area showing most potential for cost savings and effectiveness in the future.

Sourcing of application development and maintenance in focus

When looking at which areas of IT are outsourced most often, the survey shows that the common IT outsourcing towers remain a focus area of Danish organisations. Today, data centre is the most outsourced area within IT (71%), closely followed by network (data), application hosting and application development (62%, 57% and 52%, respectively). Within the next two years, the IT leaders' focus is thought to be more direct on the application environment – application development, maintenance and hosting have the highest outsourcing potential in the years to come (52%, 33% and 33%, respectively).

Supplier relationship is paramount for success

Our survey demonstrates that Danish IT leaders believe that a number of issues are important to a successful outsourcing relationship. 70% believe that a spirit of partnership between client and vendor is very important. 65% find the same to be true for strong joint client/vendor governance of the agreement. And 55% find it important to have a well-engineered service level agreement (SLA) in place. Detailed contract terms and conditions are seen as least important for the choices. Despite this fact, 35% of the respondents believe that managing and driving the performance of suppliers is an area to improve.

Desperately seeking transparency

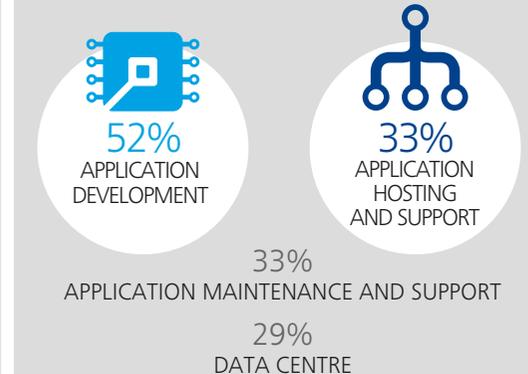
Of the IT leaders surveyed, 20% said that their outsourcing supplier in general delivers the transparency necessary to build a trustful relation. 70% believe that their supplier to some degree delivers this, and 10% answered no to this question. Also, one out of four IT leaders in Denmark are uncertain whether they are paying the market price for outsourced services – 5% says that they are not.

OUTSOURCING DANISH TRENDS

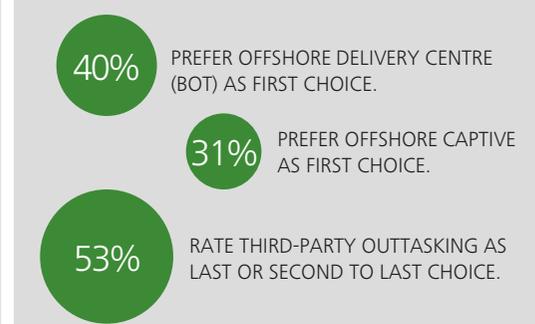


ONLY 20% OF THE IT LEADERS ANSWER YES WHEN ASKED IF THEIR SUPPLIERS IN GENERAL DELIVER THE TRANSPARENCY NECESSARY TO BUILD A TRUSTFUL RELATION.

IT OUTSOURCING TOP 4 TO OUTSOURCE WITHIN 2 YEARS



SOURCING MODELS 1ST CHOICE FOR OUTSOURCING



The case of Denmark Quick wins

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What are the most important subjects on the Danish IT organisations' agenda? And how can the challenges be assessed and possibly solved? Danish CIOs should focus on three things.

Is the price right for your IT outsourcing services?

Outsourcing is always a hot topic on the CIO's agenda; whether it be for cost savings, commercial advantages or to focus on the core business. This survey shows that not only is IT outsourcing the most used form of sourcing today, it is also the one getting the most focus within the next two years. However, even though 95% of Danish organisations are outsourcing their IT, 25% are uncertain whether they are paying the right price for these services – and 5% know that they are not paying the market price. The pricing of outsourcing services is therefore something for Danish IT organisations to look more deeply into as there might be a lot of money to save here. In Deloitte's experience, this is an obvious area for quick wins. A thorough benchmarking analysis can help Danish IT organisations gain this vital knowledge and ensure that the price they are paying for outsourcing services is just right.

Manage your IT vendor and accelerate performance

It is never an easy task to control an IT vendor, which this survey also makes very evident. However, controlling your IT vendor is the key to ensure the total performance of your IT organisation. Contradicting the surveyed IT leaders, our belief is that a solid and operational contract is paramount, and building from that foundation, the starting point for driving vendor performance is to get the right processes and tools in place. With the right processes and tools in place, you can begin accelerate your IT performance by ensuring transparency and well-defined interfaces between your organisation and your IT vendor.

From IT operations to strategic partner

IT organisations often wish to be increasingly seen as a strategic partner, but are often perceived to be a problem child detached from the business where dialogue is hindered by operational issues and poor user experience. To go from this passive operational role into being an important asset on the strategic stage, the IT organisation needs to exceed on a variety of parameters, but never forgetting operations. Stable and well-performing operations are the foundation for IT. Based on this, the IT organisations should begin building competences within understanding what is important to the business and efficiently deliver – and exceed – on these expectations. Only then can IT become the important player on the strategic stage as it should be.



My take

**Thomas Andersen, Partner
Deloitte Consulting, Denmark**

It is clear that outsourcing has become a natural part of professional Danish IT organisations. For many companies I have consulted over the past 20 years this has been an exciting journey with both great benefits and difficult challenges. Despite the fact that many organisations are outsourcing parts of their IT today, we believe that there is still a huge untapped potential in IT outsourcing – both for cost savings and for streamlining the business. IT organisations should continuously assess the sourcing model in use. Actually, we often find cost savings of approximately 20-40% in our IT sourcing projects depending on the specific activities.

Furthermore, what I have become very aware of is that CIOs are being disqualified as the strategic partner to the business because they are not as successful in delivering on operational stability, agility and flexibility to support specific business requirements and aligned to cost as expected by the business. Being aware of this paradigm can grant the CIOs the strategic position they wish to have. Most CIOs are performing very well on many IT areas, however, they sometimes forget to maintain focus on the more IT technical areas such as delivering a stable IT environment and market-aligned costs, while building the platform of trust with the business – you need the entire range of services to be a successful CIO and IT leader. That is my experience.



Key contact

Kristian Skotte
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Key contact

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IT Strategy & Effectiveness

The case of Denmark Danish variations

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IT budgets and priorities

Denmark is more likely to:

- Have experienced increases or no change in the IT budget across all industries. Only 25% of the CIOs indicate a budget decrease. However, there is a tendency towards focus on reducing and containing IT costs during the next 12-18 months.

Talent

Denmark is less likely to...

- Pay above the market rate to attract and retain talent.

Business partnering

Denmark is more likely to:

- Have a high level of satisfaction (80%) when it comes to maintaining a sufficient level of operational stability, customer satisfaction as well as a stable high level of end-user satisfaction.

Denmark is less likely to:

- Believe that the suppliers deliver the full transparency necessary to build a trustful relation.
- Manage and drive the performance of suppliers and build collaborative relationships with strategic suppliers to maximise value in the products industry – more than 40% of the CIOs asked reported this as an area to improve.

Innovation

Denmark is more likely to:

- Have innovation as a key part of the organisation's business strategy.

Denmark is less likely to:

- Have a clear understanding of how the IT function can support the company's innovation strategy.

CIO career

Denmark is more likely to:

- Have a neutral standpoint when asked about the level of access to adequate training and development opportunities to meet career aspirations.

IT operating model – the Danish landscape

There is a tendency among Danish IT leaders to:

- See the expected value of the IT function, to deliver value as an enabler, to implement business strategy and to optimise processes.
- Worry about keeping up the pace and re-inventing how to do things in an agile and cost-efficient manner while still delivering stability.

Sourcing – the Danish landscape

There is a tendency among Danish IT leaders to:

- Increase the application of outsourcing in the area of information technology during the next 2 years.
- Have implemented cloud computing services in the field of IT infrastructure services.

Regional variations

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Canada

More likely to...

- rate themselves as "excellent" business partners
 - promote work/life balance to recruit and retain talent
 - adopt Public Cloud
- ### Less likely to...
- focus on maintaining IT operations
 - have talent gaps in technology strategy & architecture
 - have problems recruiting

Northern Europe

More likely to...

- be supporting "business as usual" IT
- ### Less likely to...
- provide access to cutting-edge projects to attract and retain talent

Eastern Europe & Russia

More likely to...

- rate themselves as "excellent" business partners
 - promote work/life balance to recruit and retain talent
 - have talent gaps in compliance, risk & security
- ### Less likely to...
- have an established IT Business Partnering function

Western Europe

More likely to...

- have talent gaps in communications and business analysis skills
 - see budget constraints as barriers to business partnering
- ### Less likely to...
- adopt BYOD or to have moved beyond monitoring analytics and big data

Southern Europe

More likely to...

- have experienced IT budget cuts
 - rate themselves as an "excellent" business partner
 - have talent gaps in compliance, risk & security
- ### Least likely to...
- be experiencing problems recruiting

Asia

More likely to...

- have seen an increase in the IT budget
 - be supporting change and growth activities
 - have an established IT Business Partnering function
 - be experiencing problems recruiting
 - be implementing augmented reality technology and reinventing ERP
 - have been in current role for more than 10 years
- ### Least likely to...
- be meeting business expectations for providing high quality data and insight, enabling business strategy, and optimising business processes

Middle East

More likely to...

- have talent gaps in compliance, risk & security
- ### Least likely to....
- Promote work/life balance to attract and retain talent

South America

More likely to...

- have seen an increase in the IT budget
- have been in current role for more than 10 years
- be motivated by an improved salary when considering a new role

Least likely to...

- have skills gap for staff that can communicate effectively

Africa

More likely to...

- have seen an increase in the IT budget
- be supporting "business as usual" IT
- have an established IT Business Partnering function
- be experiencing problems recruiting
- adopt analytics/big data and social media

Least likely to...

- Provide access to cutting-edge projects to attract and retain talent

Australia

More likely to...

- be supporting "business as usual" IT
- promote work/life balance to attract and retain talent
- have been in current role for less than 2 years

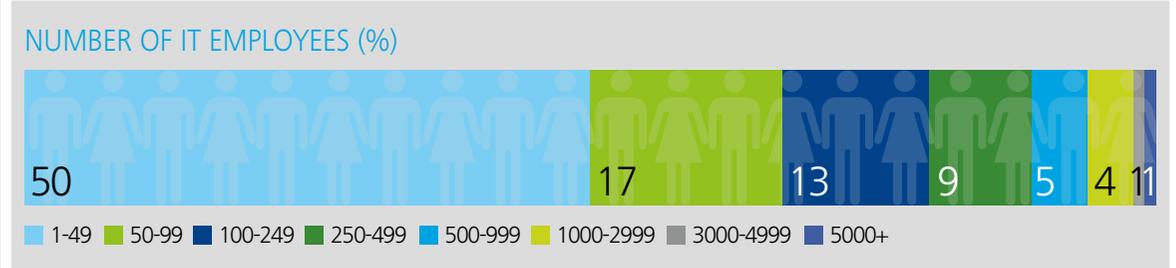
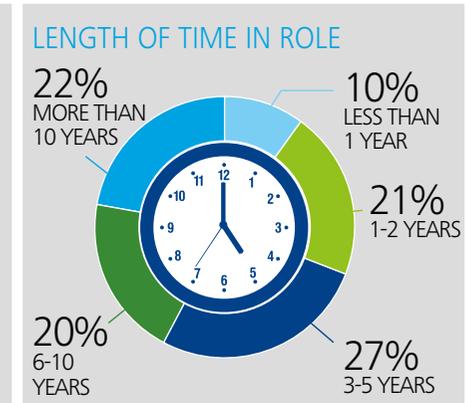
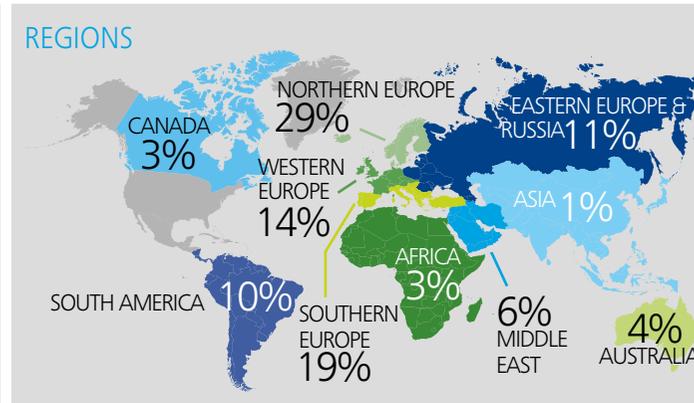
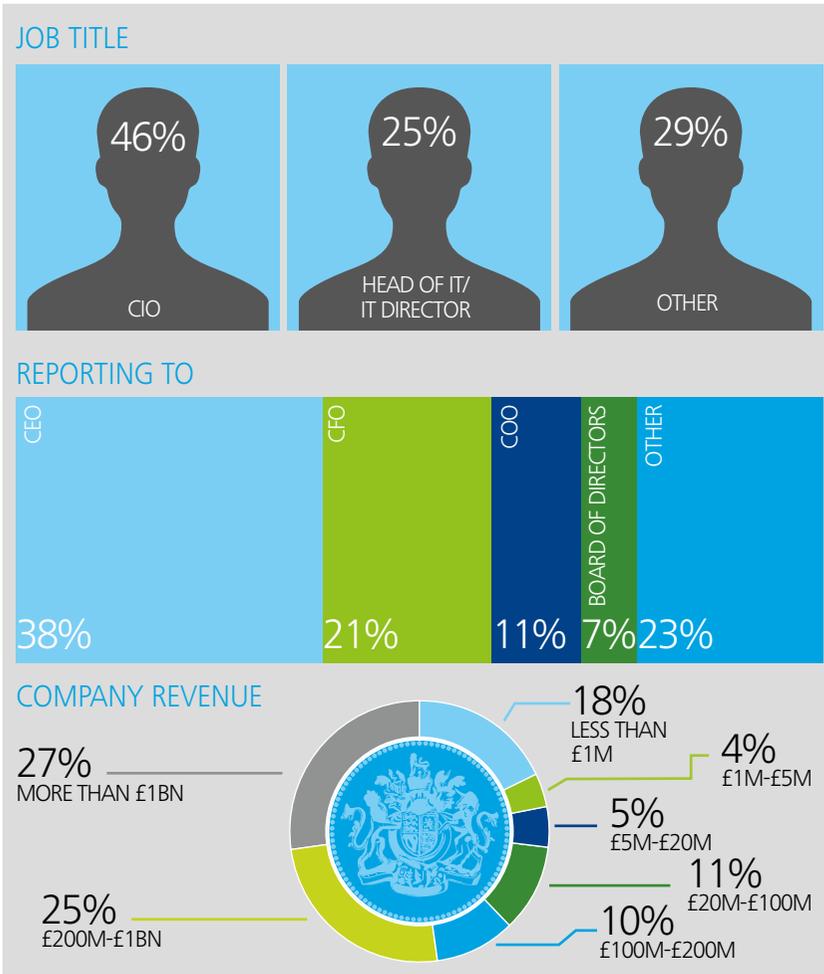
Least likely to...

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On the up

Our survey results suggest that business investment in IT is on the rise with only 22% of total respondents reporting a budget decrease from the previous year. This is reflective of most geographies and industries, with the only notable exception in the Public Sector where over a third of CIOs experienced a decrease in IT budgets this year.

Growth and change vs business as usual

So what are CIOs spending their money on? Our respondents reported that almost 60% of their IT budgets are being allocated to “business as usual” activities and the remainder to support business growth and change. While this is still a significant proportion earmarked to “keeping the lights on”, it represents a move in the right direction for those IT functions with an appetite to drive growth and change.

When asked about budget priorities, in excess of 80% of CIOs indicated that responding to new business needs is their primary focus this year. Driving digital strategy through new technologies and trends such as mobile, cloud, social media and analytics is seen as the next highest priority for over 50% of respondents. This is perhaps a reflection of the reported upkeep/increase in IT budgets and indicates a renewed focus on driving change and innovation agendas.

Operating models and sourcing

In order to respond to new business needs, CIOs are not placing a high importance on re-structuring operating models or re-considering how they source new capability from their external suppliers. IT leaders might be missing a trick here to develop and maintain sustainable capability which is responsive to shifting business needs.

What is clear from our survey is that developing and delivering new capabilities to meet changing business requirements is the highest priority for CIOs. But are they up to the job? Are they considered a credible candidate? And can they effectively partner with the business to deliver transformational change?

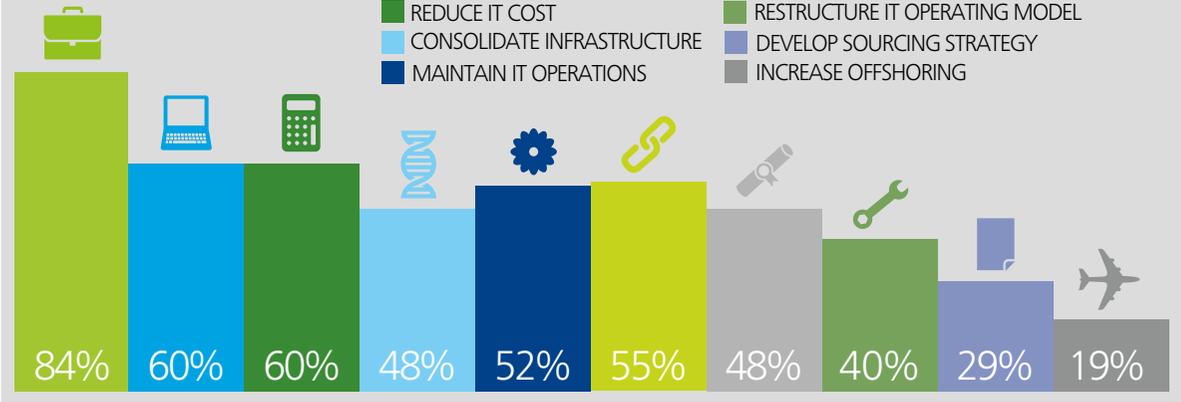
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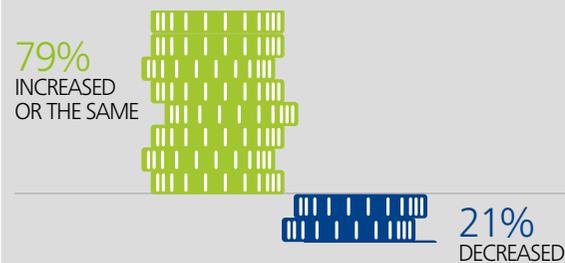
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IT PRIORITIES IN THE NEXT 12-18 MONTHS



IT BUDGETS ANNUAL SHIFTS



BUDGET ALLOCATION BUSINESS AS USUAL VS. CHANGE & GROWTH



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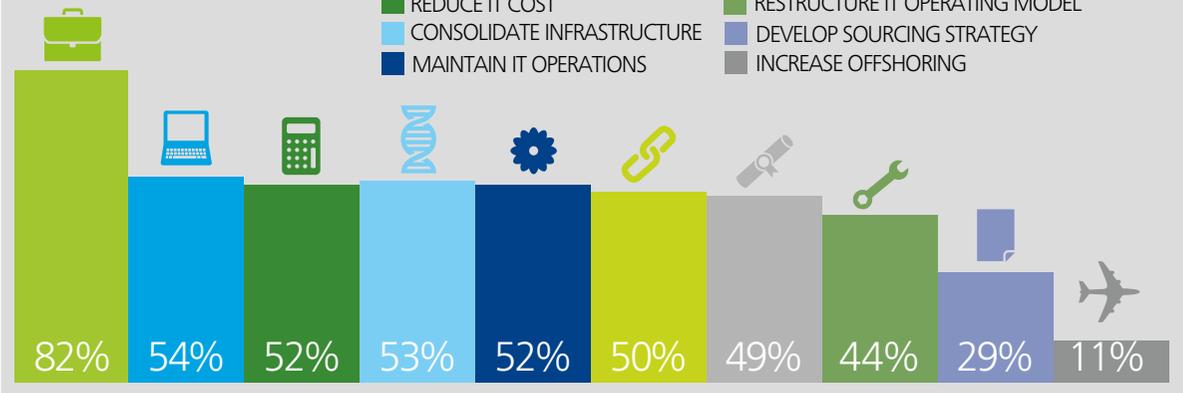
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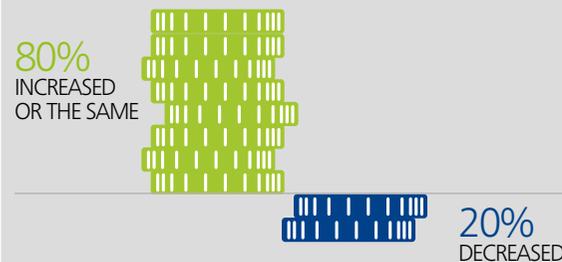
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BUDGET ALLOCATION BUSINESS AS USUAL VS. CHANGE & GROWTH



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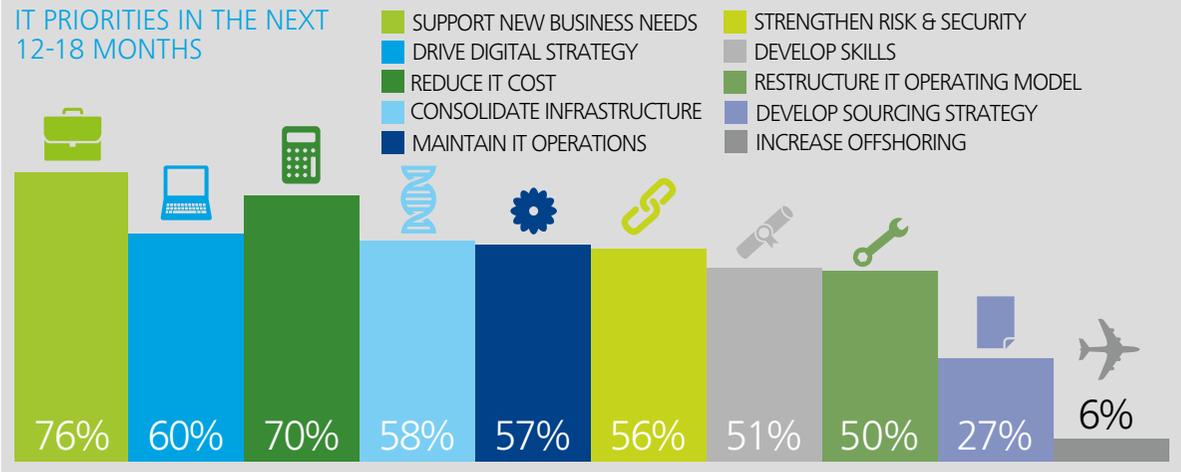
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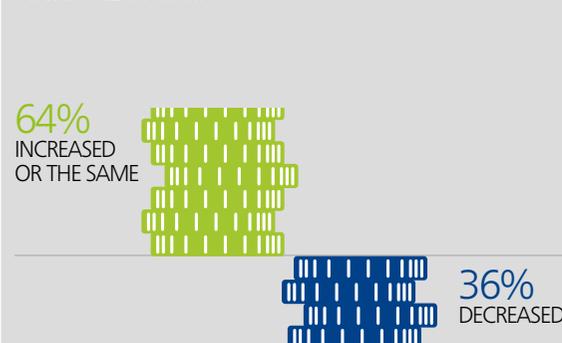
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Raising the game

Our survey reveals that IT leaders recognise the need to be an effective business partner and that opportunities exist for IT to add more value to the business in which they operate. For example, almost 70% of those surveyed believe they can make the biggest difference within their organisation by enabling business strategy. However, our CIOs acknowledge that they still have some way to go to improve their reputation as a credible partner to the business. This was highlighted by the 61% of respondents who rated their existing business partnering capabilities as either fair or poor, only collaborating with other business areas to add strategic value from time-to-time, or not at all. So what is stopping CIOs from being consistently effective business partners?

Service provider or business partner?

A significant proportion of CIOs still see their team's greatest asset as delivering routine IT services, with 89% rating their effectiveness in this space as either meeting or exceeding expectations. At the same time, they recognise more needs to be done in areas which help facilitate business change, in particular, improving their team's capacity to provide high quality data and insight, and optimising new business processes. If CIOs themselves feel their 'sweet spot' is in the delivery of routine services, then it will be difficult for their stakeholders to view them any differently.

Business perception

When asked to identify the top barriers to effective IT business partnering, CIOs cited a lack of business understanding and a poor perception of the role of the IT function as the main reasons. The second most common barrier is seen as conflicting IT priorities and a lack of resources to support a dedicated IT business partnering strategy. Our chapter on *Talent* explores how significant capability gaps in terms of business facing skills within IT organisations could be contributing to both business perception and resulting resource issues.

All is not doom and gloom

A positive finding from our survey is that establishing a dedicated business partnering function seems to be giving CIOs the best chance of achieving excellence as a strategic partner, suggesting that more focus in this area is likely to yield better results. Of those respondents who rated their IT function as an 'excellent' strategic business partner, 65% already have a dedicated business partnering function in place. Tellingly, of those that rated themselves as "poor" partners to the business, 88% have not yet formalised this capability within their teams.

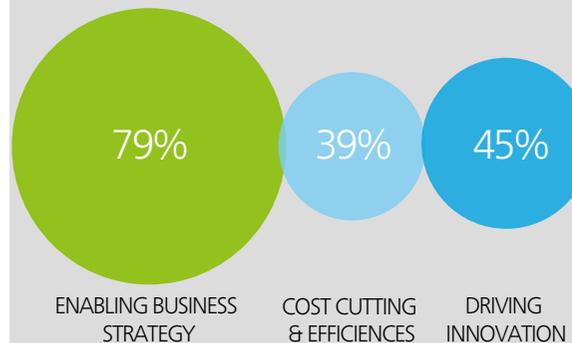
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IT VALUE DRIVERS TOP WAYS BUSINESS LEADERS EXPECT IT TO ADD VALUE



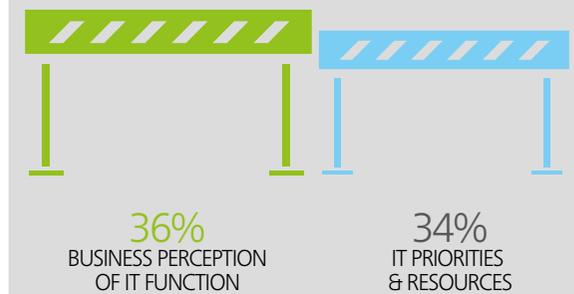
STRENGTHS & WEAKNESSES DRIVING BUSINESS VALUE



IT BUSINESS PARTNERING EFFECTIVENESS



BARRIERS TO BUSINESS PARTNERING FACED BY IT LEADERS



BUSINESS PARTNERING: QUICK WINS ►

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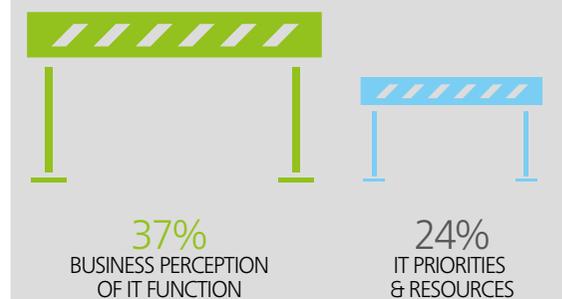
STRENGTHS & WEAKNESSES DRIVING BUSINESS VALUE



IT BUSINESS PARTNERING EFFECTIVENESS



BARRIERS TO BUSINESS PARTNERING FACED BY IT LEADERS



BUSINESS PARTNERING: QUICK WINS ►

Business partnering Key findings

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Raising the game

Our survey reveals that IT leaders recognise the need to be an effective business partner and that opportunities exist for IT to add more value to the business in which they operate. For example, almost 70% of those surveyed believe they can make the biggest difference within their organisation by enabling business strategy. However, our CIOs acknowledge that they still have some way to go to improve their reputation as a credible partner to the business. This was highlighted by the 61% of respondents who rated their existing business partnering capabilities as either fair or poor, only collaborating with other business areas to add strategic value from time-to-time, or not at all. So what is stopping CIOs from being consistently effective business partners?

Service provider or business partner?

A significant proportion of CIOs still see their team's greatest asset as delivering routine IT services, with 89% rating their effectiveness in this space as either meeting or exceeding expectations. At the same time, they recognise more needs to be done in areas which help facilitate business change, in particular, improving their team's capacity to provide high quality data and insight, and optimising new business processes. If CIOs themselves feel their 'sweet spot' is in the delivery of routine services, then it will be difficult for their stakeholders to view them any differently.

Business perception

When asked to identify the top barriers to effective IT business partnering, CIOs cited a lack of business understanding and a poor perception of the role of the IT function as the main reasons. The second most common barrier is seen as conflicting IT priorities and a lack of resources to support a dedicated IT business partnering strategy. Our chapter on *Talent* explores how significant capability gaps in terms of business facing skills within IT organisations could be contributing to both business perception and resulting resource issues.

All is not doom and gloom

A positive finding from our survey is that establishing a dedicated business partnering function seems to be giving CIOs the best chance of achieving excellence as a strategic partner, suggesting that more focus in this area is likely to yield better results. Of those respondents who rated their IT function as an 'excellent' strategic business partner, 65% already have a dedicated business partnering function in place. Tellingly, of those that rated themselves as "poor" partners to the business, 88% have not yet formalised this capability within their teams.

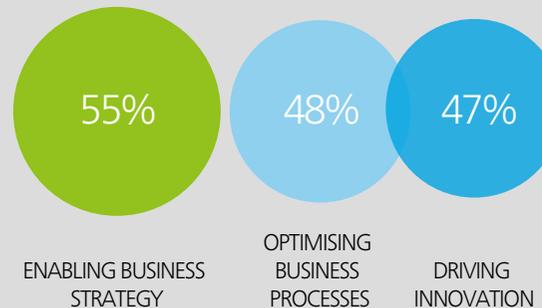
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IT VALUE DRIVERS TOP WAYS BUSINESS LEADERS EXPECT IT TO ADD VALUE



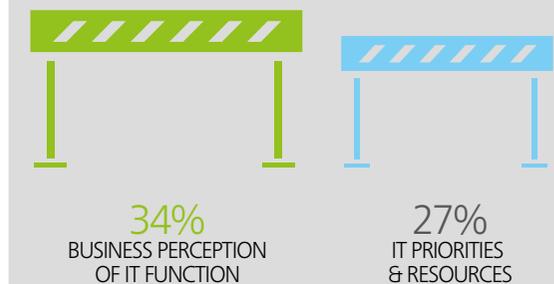
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The talent gap is in business-facing skills

Responses to the Talent section of our survey suggest that many CIOs are still struggling to find the right blend of technology expertise and business skills to support business demands. Over half of CIOs are experiencing difficulties sourcing staff that can think like the business, while just under half are struggling to find professionals that can think strategically and communicate effectively. Our *Business Partnering* findings suggest that this talent gap is also seriously impacting the effectiveness of CIOs as business partners.

Wanted: business-centric technical skills

In terms of technical skills, the top areas CIOs identified as in need of improvement were equally business-focussed and strategic in nature. 42% of CIOs are demanding more in terms of business analysis skills, for example, team members capable of identifying business needs and delivering technology solutions to business problems. Around a third of CIOs are also experiencing shortages of skills within their teams in delivering technology strategy and architecture, and analytics and big data.

Getting creative with talent attraction

This continued shortage of talent in business-centric roles within the IT function seems to be due in part to a lack of experienced staff in the market, according to respondents across the majority of regions. However, many IT leaders are adopting increasingly creative tactics to attract and retain this new breed of professional into their organisations. Over 40% of respondents are redesigning IT roles and structures and/or providing access to cutting edge IT projects, possibly reflecting a growing realisation that IT leaders need to start making a role in IT a much more attractive career choice. These responses outweighed traditional strategies such as paying above the market rate, and providing better work/life balance opportunities.

Missing an opportunity?

Only 12% of CIOs are offering opportunities on projects outside the IT function as a mechanism to attract and retain talent. We believe IT leaders are missing a chance to get closer to the business by not placing a greater emphasis on encouraging teams to build relationships and foster better links with other business functions.

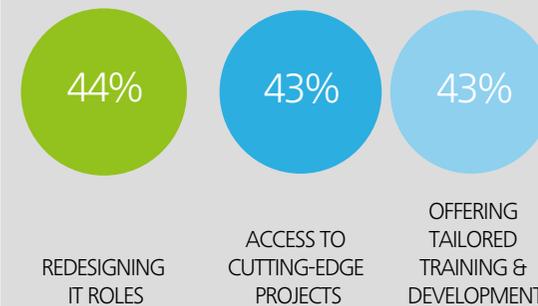
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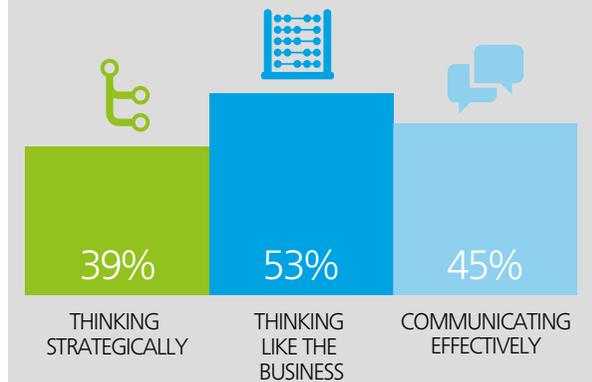
RECRUITING & RETAINING TALENT TOP TACTICS



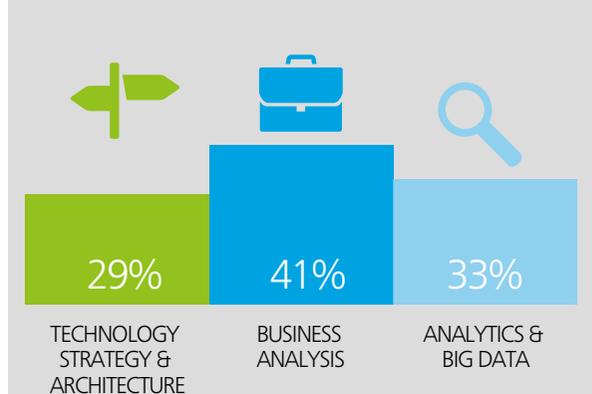
RECRUITMENT CHALLENGES



BUSINESS SKILLS GAPS TOP THREE WITHIN IT FUNCTIONS



TECHNICAL SKILLS GAPS TOP THREE WITHIN IT FUNCTIONS



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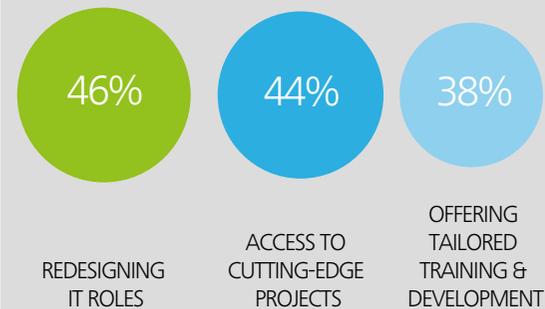
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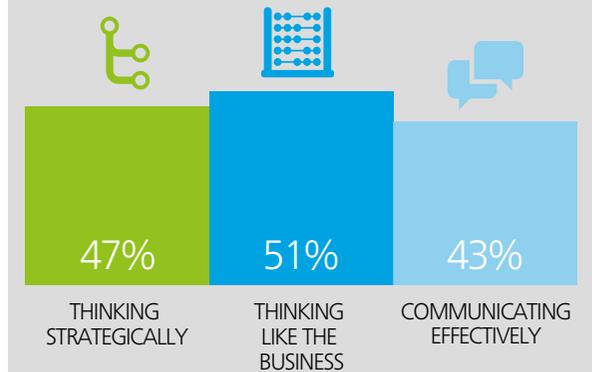
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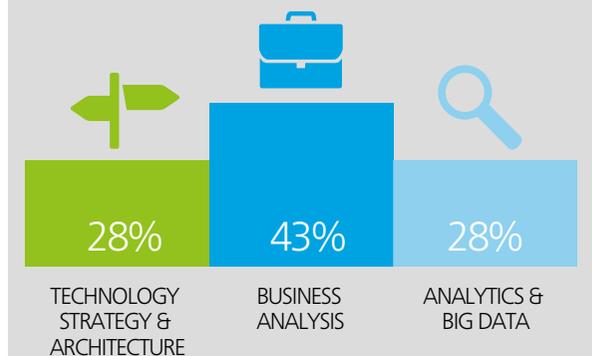
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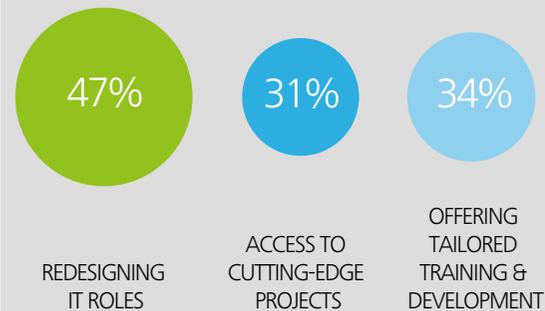
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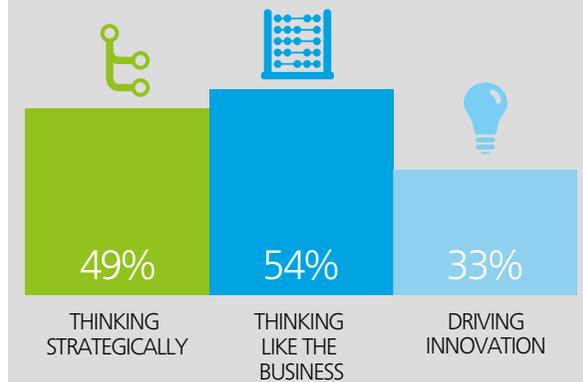
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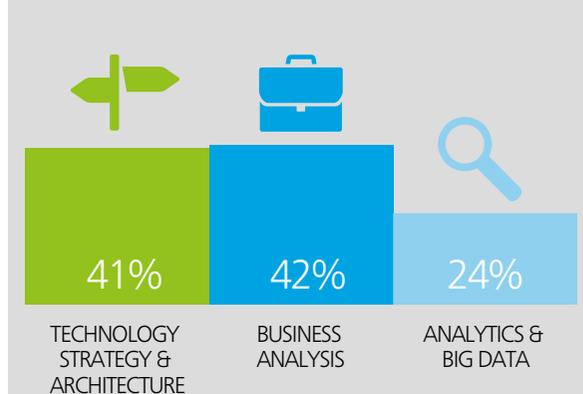
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The business needs IT innovation

Technology-driven innovation is fast becoming a key lever for organisations to realise competitive advantage, a message re-inforced by the fact that almost two-thirds of CIOs confirmed that innovation is a key part of their organisation's business strategy. Three-quarters also stated they have a clear understanding of how their IT function could support their organisation's innovation strategy, citing operational efficiency, market development, and product /service differentiation as being the top three ways that innovative technologies could add the most business value.

IT is not yet delivering on its innovation potential

Despite these perceived opportunities, 65% of CIOs do not believe that their IT function is considered a credible hub of innovation within their organisation. Almost half of all respondents claim that IT priorities, resources and budget constraints are the key barriers preventing them from effectively supporting their business's innovation agenda. A further proportion of IT leaders see opposing strategic priorities and a lack of understanding of IT within the business as obstructing the progress of IT innovation. Many of these are consistent with the top barriers CIOs feel are preventing them from becoming effective business partners.

Innovative technologies

Despite emerging technologies promising a transformational and disruptive effect on the business, our survey results suggest that many IT leaders are still only just starting to leverage their potential to support their innovation agenda. Highest adoption rates are being seen across mobile, private cloud and social media, however these technologies are still only being implemented or fully operational within around 30-40% of respondent IT functions. At the same time another 40-50% have still not moved beyond researching these rapidly evolving technologies, indicating that there is still significant potential to be unlocked.

Big data, big gap

Big data is fast becoming a key strategic asset in many organisations. Despite this, over half of respondents are still at a very early stage of the adoption curve with 64% of respondents still only monitoring or researching these technologies. It appears that many CIOs remain to be fully convinced of the benefits that big data and Analytics can bring to their businesses.

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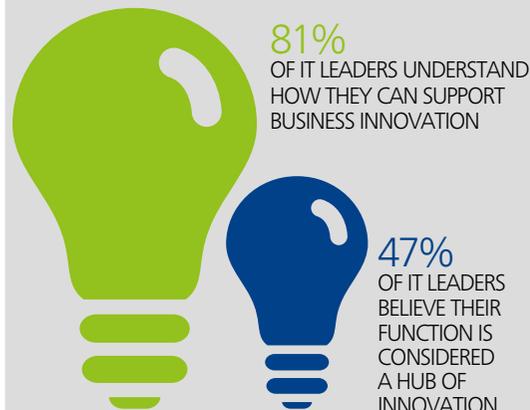
BUSINESS VALUE THROUGH TECHNOLOGY



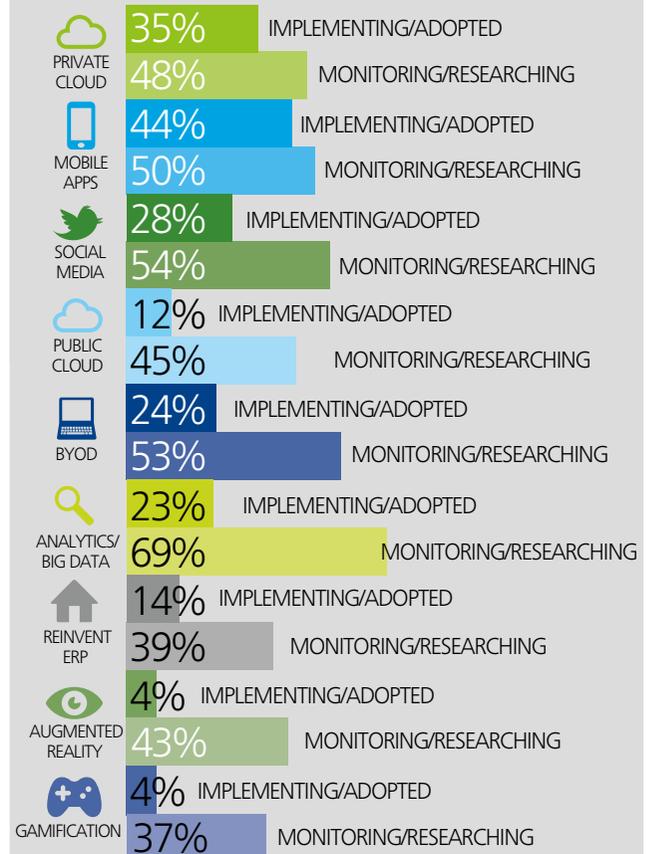
INNOVATION BARRIERS FACED BY IT LEADERS



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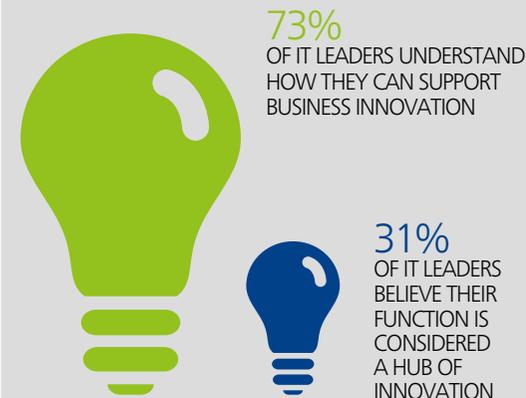
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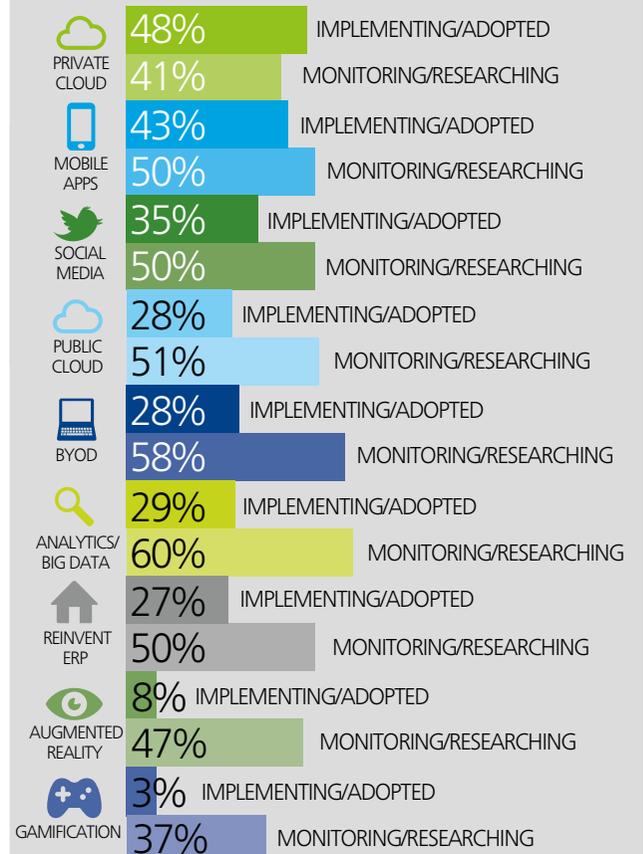
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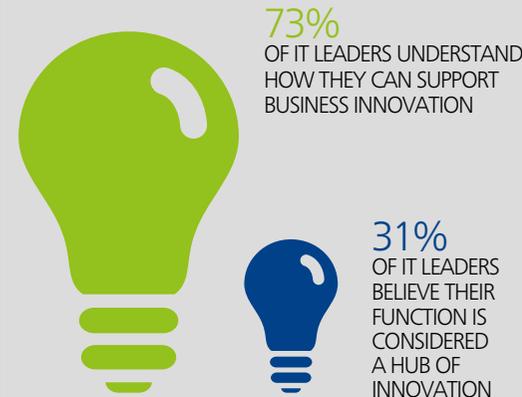
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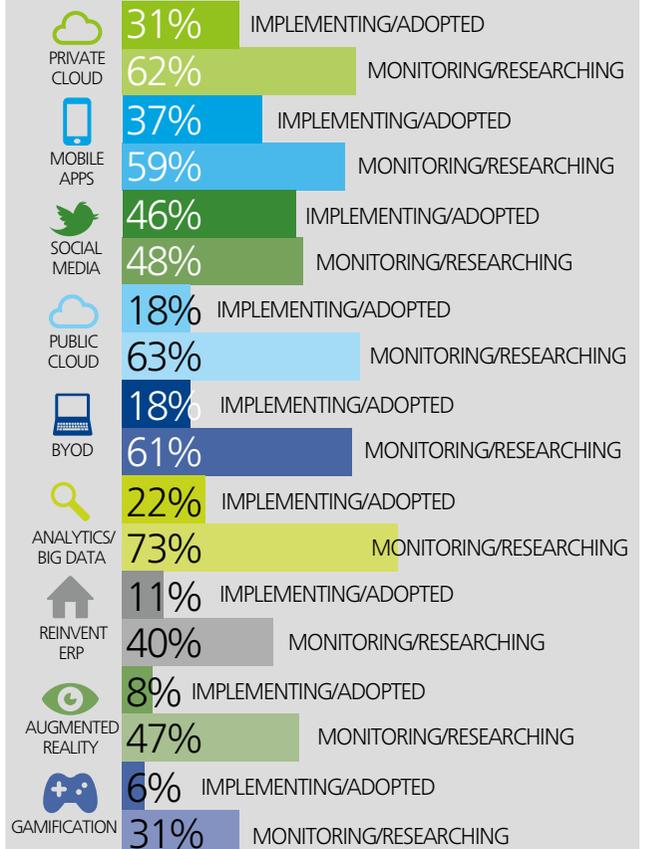
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Appetite for more business impact

It is clear from the survey that IT leaders want to have a more strategic impact on their organisations than they currently do, with the top motivation for a career move being a desire to make a greater contribution to business strategy. They believe that enabling the business strategy is the top way that their business stakeholders expect them to add business value. This suggests that IT leaders are clear on where their priorities need to be, but do not feel they are currently in a position to deliver against this in their current organisation. This clearly indicates that many organisations are not getting the best out of their IT leaders in terms of the contribution they can make in the C-suite and indeed risk losing them altogether.

A fulfilling career?

Our survey demonstrates that the role of the IT leader is not necessarily one of short tenure. 69% of respondents have been in their current role for more than 3 years, and 40% have been in the role for more than 6 years. However, one-third of respondents do not agree that their role as an IT leader gives them a range of job opportunities for a varied and fulfilling career. This perhaps indicates frustrations amongst CIOs, who recognise there are opportunities to add value but are constrained to deliver on their potential.

Business-focussed career move

The idea of IT leaders moving to a career outside of IT may have been unlikely in the past, but our survey shows that attitudes and aspirations on this are starting to change. Although approximately half of respondents felt they would most likely remain in an IT leadership role for their next career move, many are still attracted and aspire to new and even more senior roles in the executive management team – most notably the COO or CEO – in their quest for a new challenge and a greater influence, contribution, and impact on the business strategy.

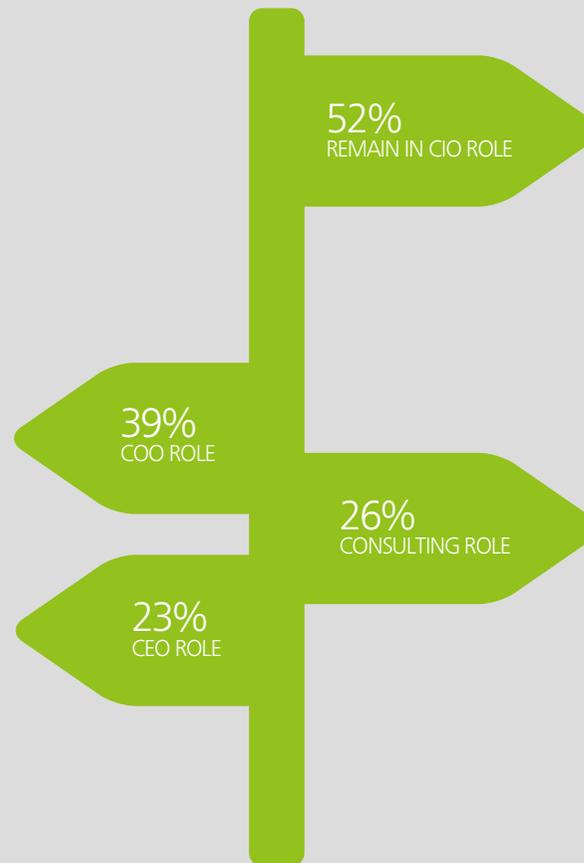
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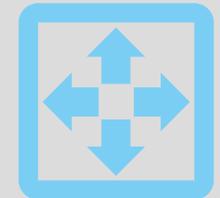
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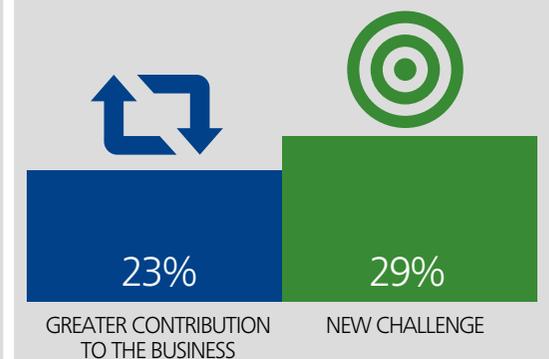


36%
OF IT LEADERS DO NOT AGREE THAT THEY HAVE ACCESS TO ADEQUATE TRAINING AND DEVELOPMENT



31%
OF IT LEADERS DO NOT AGREE THAT THEY HAVE ACCESS TO OPPORTUNITIES FOR A FULFILLING CAREER

CAREER MOVES TOP REASONS TO MOVE ON



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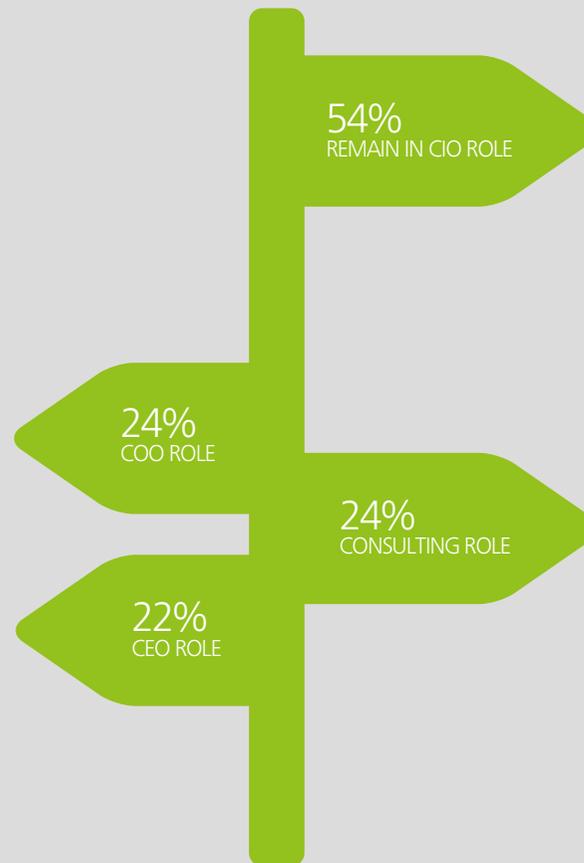
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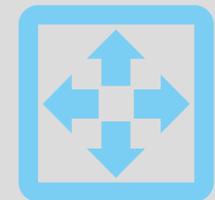
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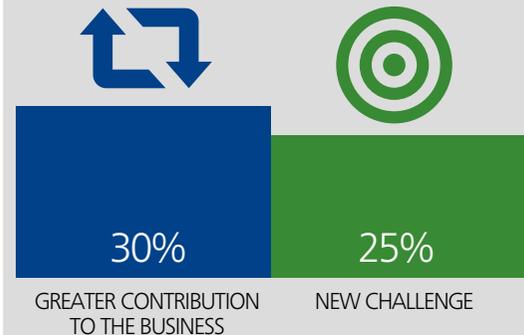


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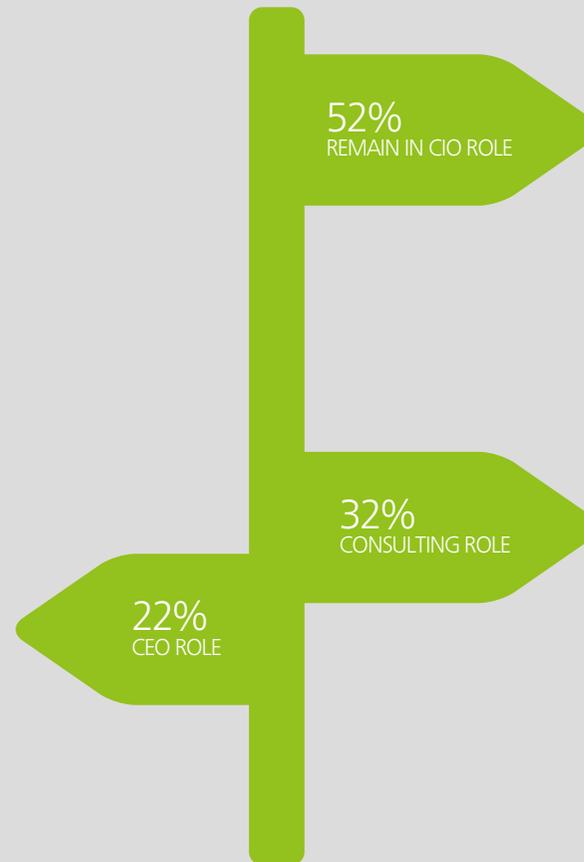
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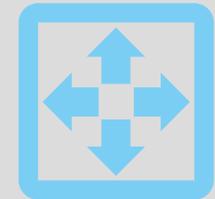
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JOB SATISFACTION TRAINING & CAREER OPPORTUNITIES



21%
OF IT LEADERS DO NOT AGREE THAT THEY HAVE ACCESS TO ADEQUATE TRAINING AND DEVELOPMENT



35%
OF IT LEADERS DO NOT AGREE THAT THEY HAVE ACCESS TO OPPORTUNITIES FOR A FULFILLING CAREER

CAREER MOVES TOP REASONS TO MOVE ON

