

2021 CIO Agenda: Time for Catalunya to Seize the Moment and Deserve the Money

In collaboration with:

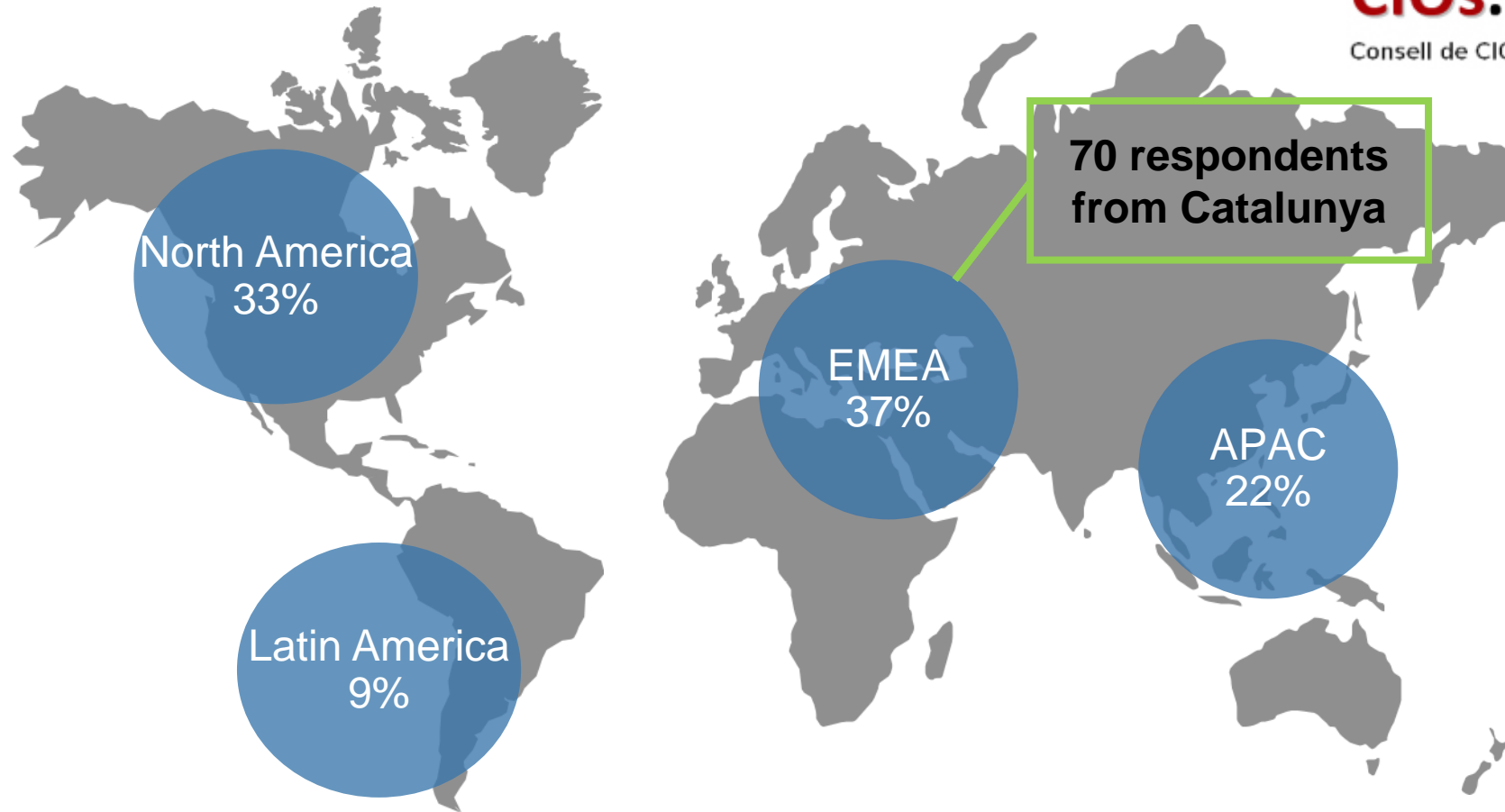


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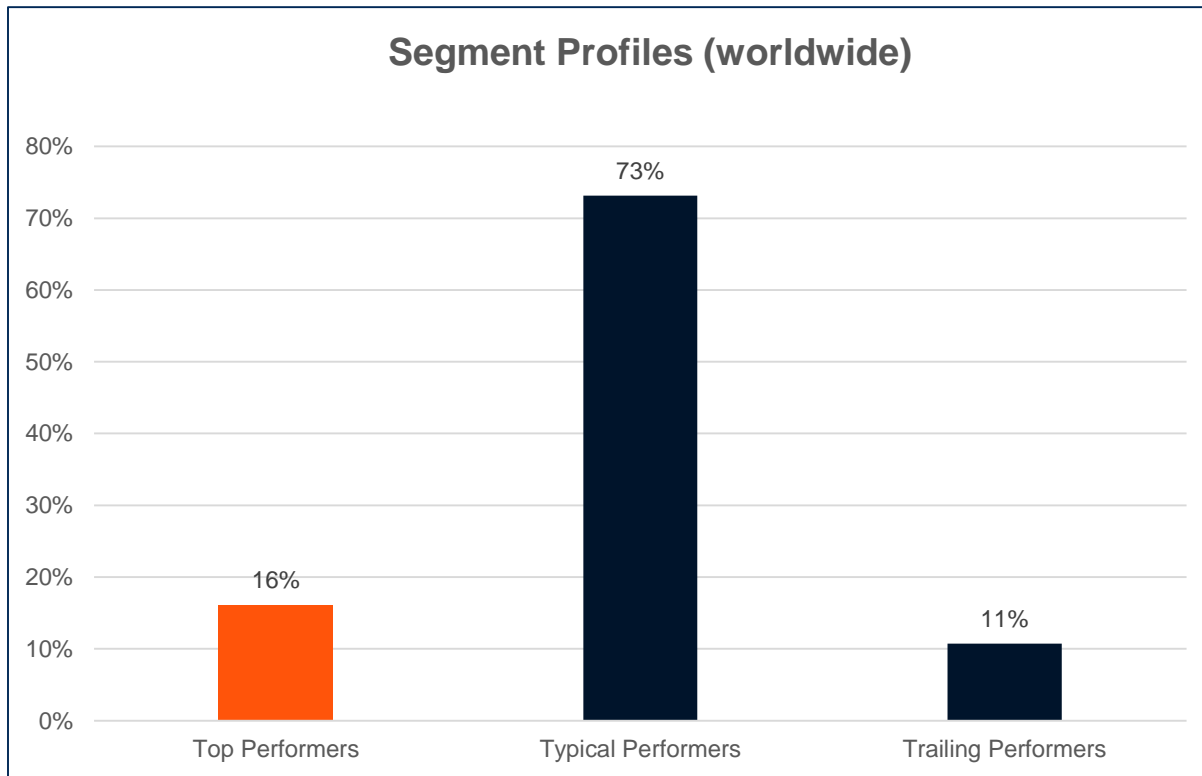
Respondent profile: Regions



n = 1.877 All Respondents
Q. Where is your primary worksite located?
Source: 2021 Gartner CIO Survey
ID: 123456

1877 respondents worldwide

Respondent profile: Segments



n =1.877 All Respondents

Source: 2021 Gartner CIO Survey
ID: 123456

Definition of Top-Performer (meet all three):

- **Relative business performance compared with competitors is ahead of where it would have been had COVID-19 not become a global pandemic**
- **Organization's digital initiative is in the scale or refine stages (the two top categories)**
- **Organization has already planned and implemented a post-COVID19 strategy**

Key Finding #1

**Historic
Opportunity to
Increase Your
Influence**

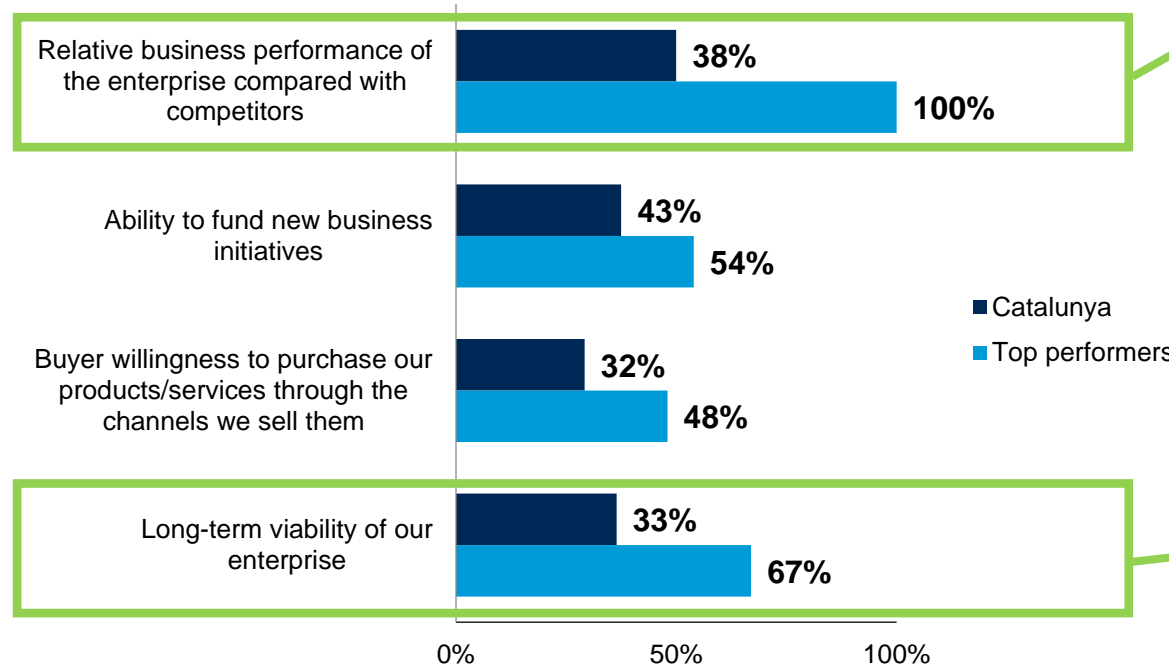
In Catalunya...

**COVID-19 Has Been a
Business Accelerator and
a Resiliency Enhancer for
Many**

COVID 19 Was A Performance Catalyst For Many

Covid-19 impact on Business Metrics

Percentage of respondents who are ahead or far ahead



Covid-19 has proven to be a **Business Accelerator** for 38%

Covid-19 has been an opportunity to increase **Business Resilience** for some

n = ~53 Catalunya respondents, Excludes "Not sure/Not applicable"

Q. In the following performance areas, would you assess your enterprise as ahead or behind where it otherwise would be had COVID-19 not become a global pandemic?

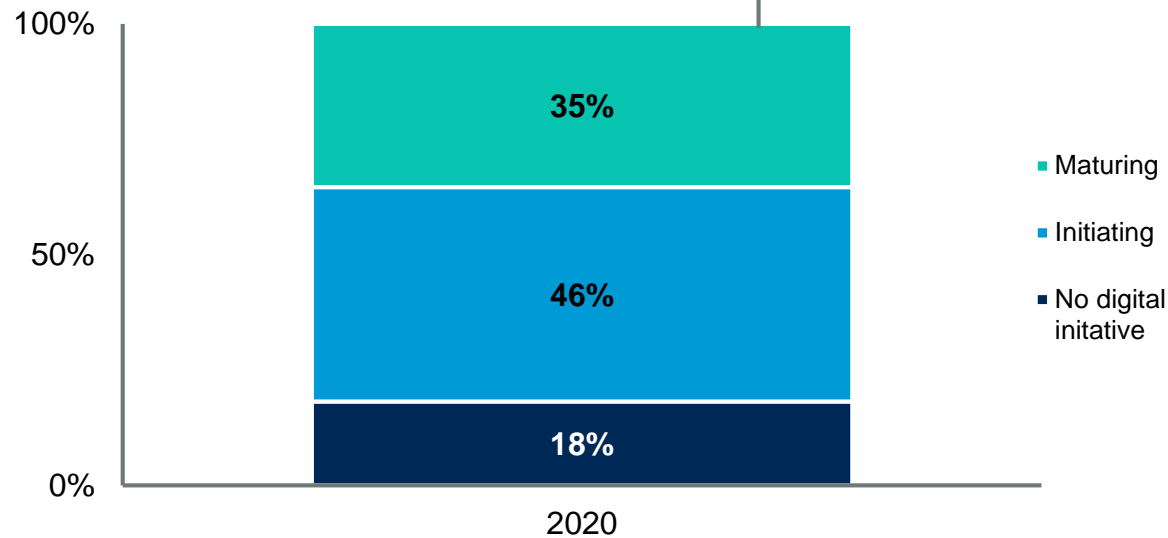
Source: 2021 Gartner CIO Survey

ID: 123456

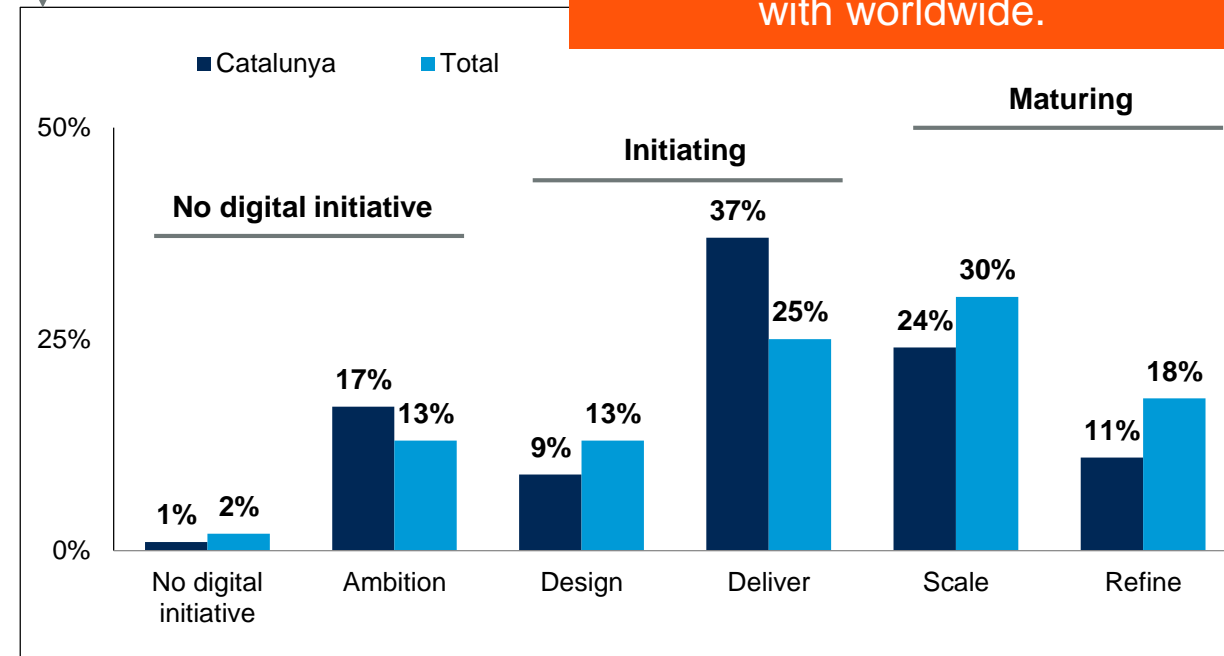
Digital Business Maturity is Improving

Stage of Digital Maturity
Percentage of Respondents

zoom-in



Catalunya digitalization is in a reasonable good shape. Still room for improvement compared with worldwide.



n = 70 Catalunya respondents, Excludes "Not sure"

Q: Which of these best describes the stage of your organization's digital initiative — i.e., your organization's digitalization efforts?

Source: 2021 Gartner CIO Survey

Notes: Dates on the chart reflect year of data collection, not the cover year of the report; . May not sum to 100% due to rounding;

No Digital initiative = No Digital Initiative, Desire/Ambition. Initiating = Designing, Delivering.. Maturing = Scaling, Harvesting/Refining

ID: 123456

n = 70 Catalunya respondents, Excludes "Not sure"

Q: Which of these best describes the stage of your organization's digital initiative — i.e., your organization's digitalization efforts?

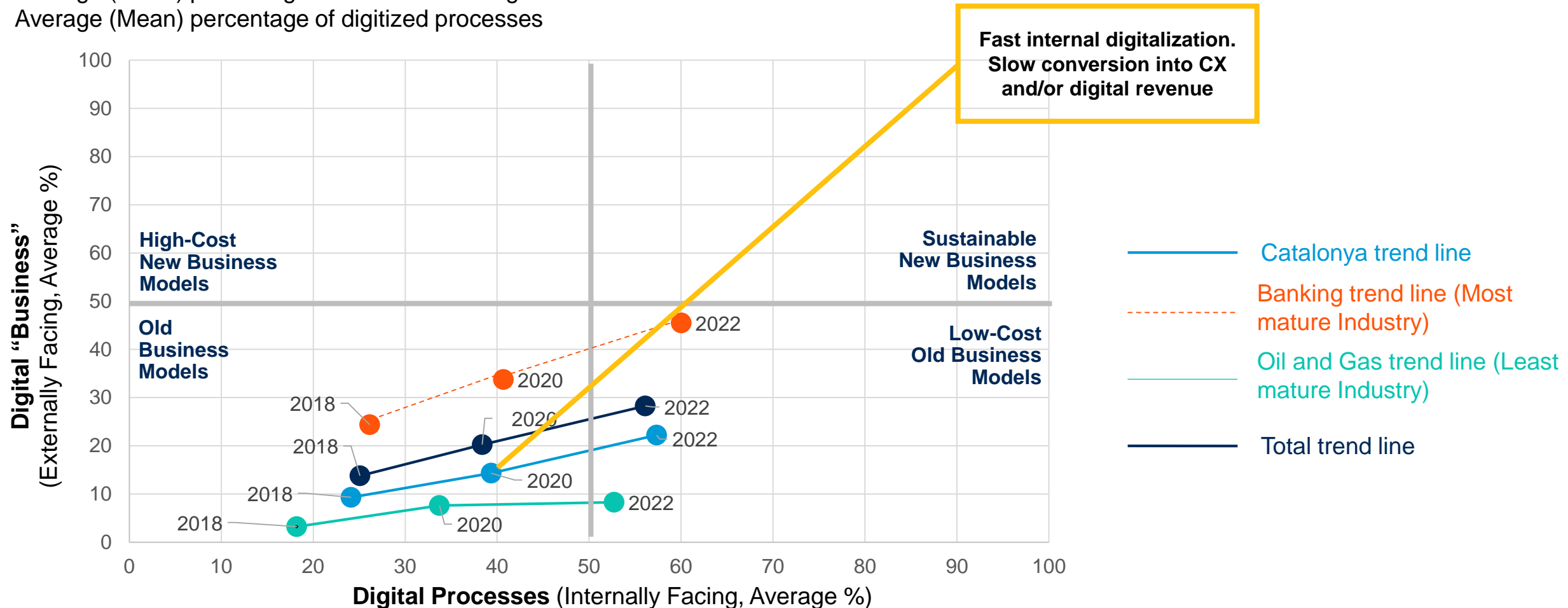
Source: 2021 Gartner CIO Survey

Source: 2021 Gartner CIO Survey

ID: 123456

Digitalization Focused On Costs, Not Revenue

Average (Mean) percentage of revenue from digital sales vs
Average (Mean) percentage of digitized processes



n = 70 Catalunya, ~1,831 (Total), ~196 (Banking) ~33 (Oil & gas), all answering

X-Axis: What percentage of your enterprise's processes have been optimized (made more efficient) through digital means?

Y-Axis: What percentage of your organization's total revenue would you attribute (or expect) as digital sales revenue?

Source: 2021 Gartner CIO Survey

ID: 123456

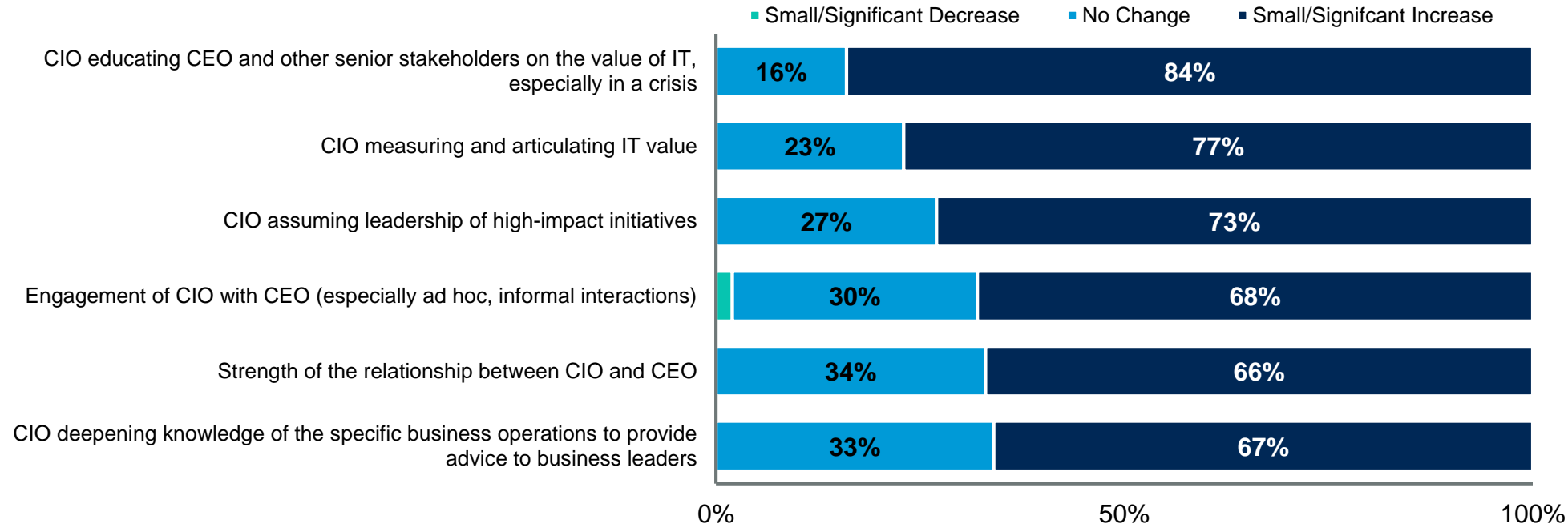
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In Catalunya...

**CIOs' Influence Has
Increased Significantly...
But Temporarily?**

CIOs Are Contributing To Strategic Changes

Changes in CIO-Business Relations Percentage of respondents



Covid-19 has been an Influence Enhancer

n = 70 Catalunya respondents, Excludes "Not sure/Not applicable"

Q. How would you characterize the following changes related to your enterprise's IT leadership as a result of the COVID-19 pandemic?

Source: 2021 Gartner CIO Survey

Not showing data labels for percentages less than 3%

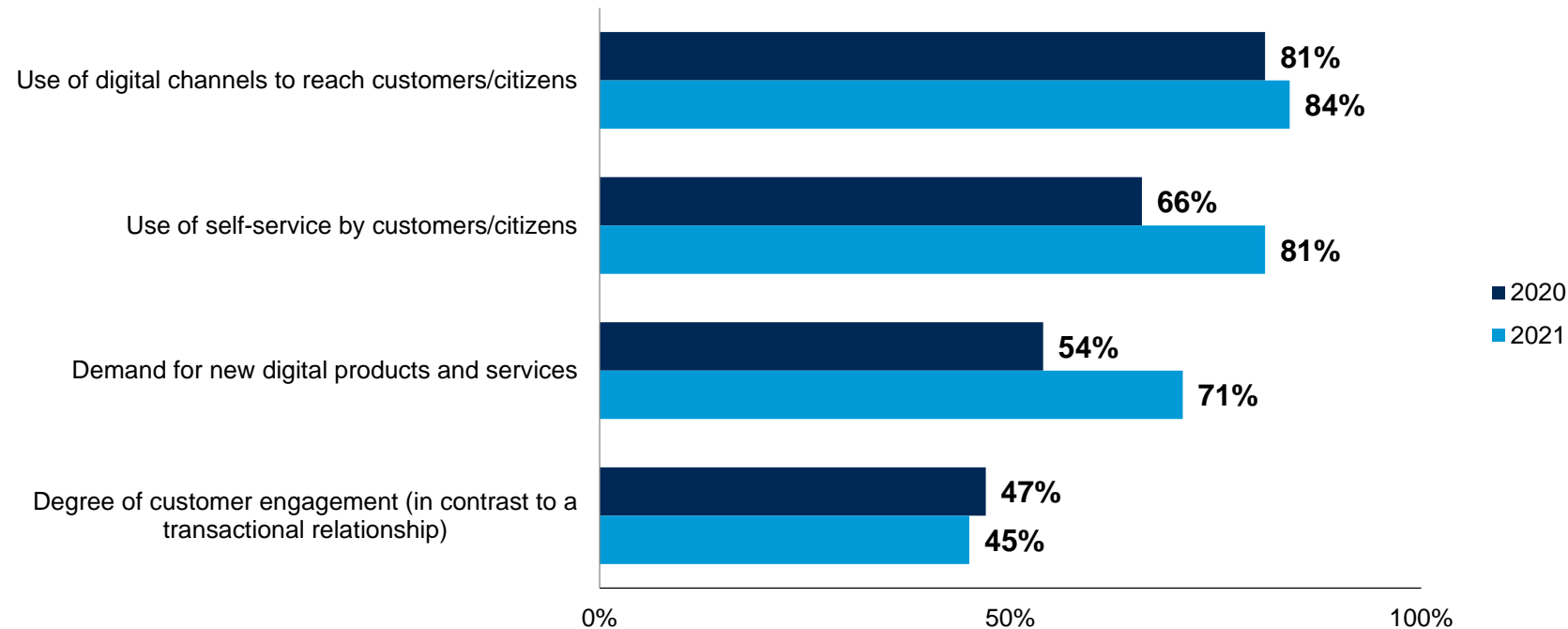
ID: 738401

In Catalunya...

CIOs Are Setting the Bar High for 2021

Customers' Needs Are Met Digitally

Changes in Customer/Citizen Engagement Due to COVID-19 and Expected in 2021
Percentage of Catalunya Respondents reporting/expecting an increase



Wow!
You are expecting to increase the good work you have already done on Customer Engagement... even more...

n = ~70 Catalunya respondents, Excludes "Not sure/Not applicable"

Q. How would you characterize the changes that have occurred in your enterprise as a result of the COVID-19 pandemic in each of these areas? vs How do you expect these aspects of your enterprise to change in 2021 compared with their status today?

Source: 2021 Gartner CIO Survey

ID: 123456

Comparison with Top Performers Worldwide:

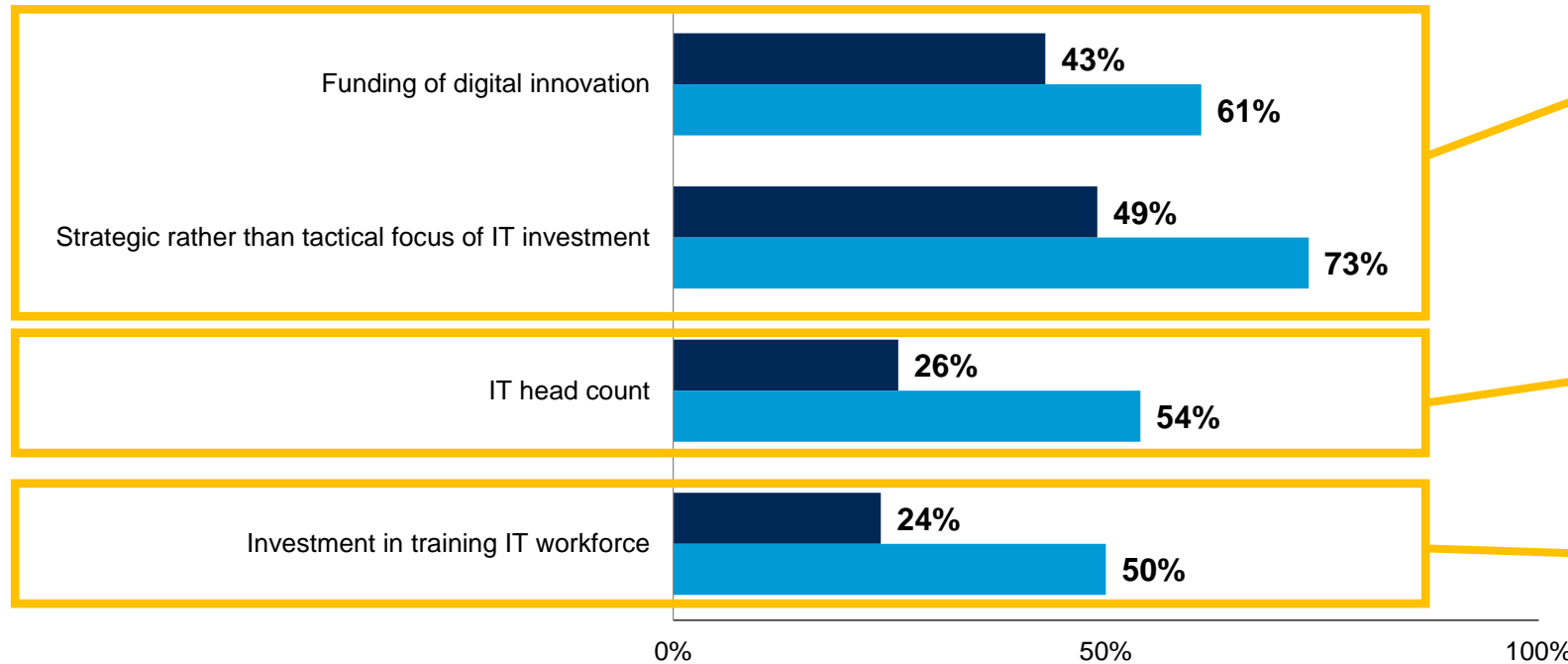
- **2020: Top Performers exhibit approx 10 p.p. more in all the categories**
- **2021: Very similar percentages**

Disruption Put A Spotlight On IT

Wow!
You are expecting to get more money...

Changes in IT Due to COVID-19 and Expected in 2021

Percentage of Catalunya Respondents reporting/expecting an increase



... to build a rather **strategic IT**

... to increase your **head count**

... to **train** your team

n = ~53 Catalunya , Excludes "Not sure/Not applicable"

Q. How would you characterize the changes that have occurred in your enterprise as a result of the COVID-19 pandemic in each of these areas?
vs How do you expect these aspects of your enterprise to change in 2021 compared with their status today?

Source: 2021 Gartner CIO Survey
ID: 123456

Comparison with Top Performers Worldwide:

- **2020: Top Performers exhibit 20 p.p. more in Funding**
- **2021: IT head count increase: 46% respondents vs 54% in Catalunya**



**Such High Expectations
Can Be Wishful Thinking or
Golden Opportunities...**

**It Depends on How CIOs
Drive Them**

Recommendations (1/3)

Catalyze a Digital Mindset in the C-Suite to Accelerate your Digital Business Transformation

In order to continue enhancing and digitalizing your business model you have to partner with the C-Suite; you will not achieve it alone. Then your contribution to the business will be crystal clear and your influence will increase going forward. However, bear in mind that the C-Suite has, on average, scant digital mindset. You must catalyze that discussion.

Unbox your Enterprise's Business Model with 'digital eyes'

Dedicate time with the C-Suite to revisit your Business Model and ask yourselves questions like:

- 'What Value Propositions to our customers could we deliver faster, better or cheaper with digital developments/infrastructure?'
- 'What Capabilities (digital technology or skills) should we acquire to create new digital Value propositions?'

See [How CIOs Can Foster Business Model Innovation Through Workshops](#) (G00466847)

Question Nondigital products

Whenever someone puts forward a nondigital solution, ask yourselves (the C-Suite):

- 'Is there a digital version of it?' and/or 'Is there a digital path to get it?'

See ["Identifying Digital Opportunities During and After the Pandemic"](#) (G00724392)

An additional resource you can use is: ["Digital Business Maturity Model: 9 Essential Competencies to Assess Digital Business Maturity"](#) (G00723533)

Recommendations (2/3)

Leverage on Existing Digital Ecosystems

Do not reinvent the wheel when it comes to finding the best ways to accelerate your digital business transformation. There are many existing digital ecosystems out there that can fulfill the technological capabilities you need to meet the value propositions of your business model. Remember that you will not be valued by what you do but by what you get.

Get to know the existing Digital Ecosystems

- Learn about various strategies to choose/partner with Digital Ecosystems.
 - See [“8 Ways Ecosystems Supercharge Digital Business Models”](#) (G00721617).
 - Find success cases from six different industries in [“Lessons From China: Business Model Resilience in the Coronavirus \(COVID-19\) Outbreak”](#) (G00722606).
- Learn how Digital Dragons can influence your industry and how you can partner with them beyond their tech providers remit.
 - See [“Executive Leaders Must Become Dragon Strategists”](#) (G00721856).

Instill a Digital Ecosystems culture in your company

- Share all the learnings from the previous recommendation with the C-Suite, in order to raise awareness on the convenience of leveraging on digital ecosystems.
- Find a systematic way of doing it in [“The CIO Leading Role in Reacting to the Emergence of Digital Dragons in Their Industry”](#) (G00465914).

Recommendations (3/3)

Avoid Backsliding to the 'Pre-Pandemic CIO'

Going back to the pre-pandemic behaviors in IT (i.e. mindsets and practices) will be a sweet temptation, specially for those new behaviors whose roots have not been planted deep enough during the pandemic. Some examples of new behaviors that many IT organizations –and most likely yours as well- have displayed during the pandemic are: acceleration of technological deployments, IT training (nobody had time for it before), secured IT funding.

The pre-pandemic CIO will perpetuate the pre-pandemic Enterprise, without incorporating any of the new good things.

Do not backslide by following these three steps:

- **Pause:** make an inventory of all the that-was-not-in-our-DNA things that, incredibly and unexpectedly, your IT organization has done during the pandemic.
- **Evaluate:** make up your mind about which of those incredible and unexpected behaviors you want to keep post-pandemic and at what extent/speed.
- **Shape:** start adapting your systems, processes and practices to make them the new reality moving forward.

Some specific recommended reading:

- [“6 Pre-COVID-19 Assumptions That Should Perish With the Virus”](#) (G00723296)
- [“The Culture PRISM: 5 Dimensions That Shape Your Culture”](#) (G00718748)
- [“Changing Behaviors: From Risk Aversion to Smart Risk-Taking”](#) (G00448185)

Key Finding #2

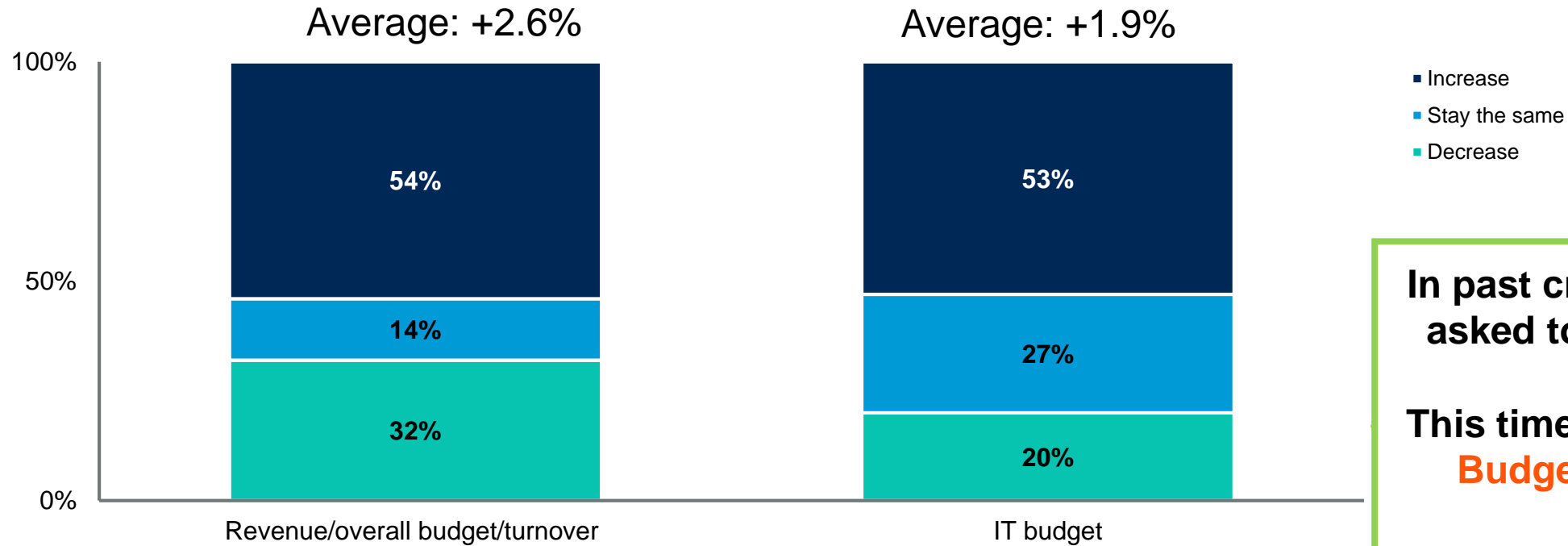
**You've got the
money!
Investments in
Technology will
Continue to Grow**

In Catalunya...

**Despite the crisis, IT
Budgets will continue to
grow**

Despite the Setbacks of 2020, Most Enterprises in Catalunya Should See Overall and IT Budgets Increase in 2021

Changes in Overall and IT Budget
Percentage of Respondents



In past crises, CIOs were asked to cut spending.

This time, CIOs expect **IT Budget to increase.**

You have the money!

CEO and Board of Directors agree!

n = 65, Catalunya respondents, Excludes "Don't know"

Q. By what percentage do you expect your enterprise's revenue/overall budget/turnover to increase or decrease from 2020 to 2021?

n = 66, Catalunya respondents, Excludes "Don't know"

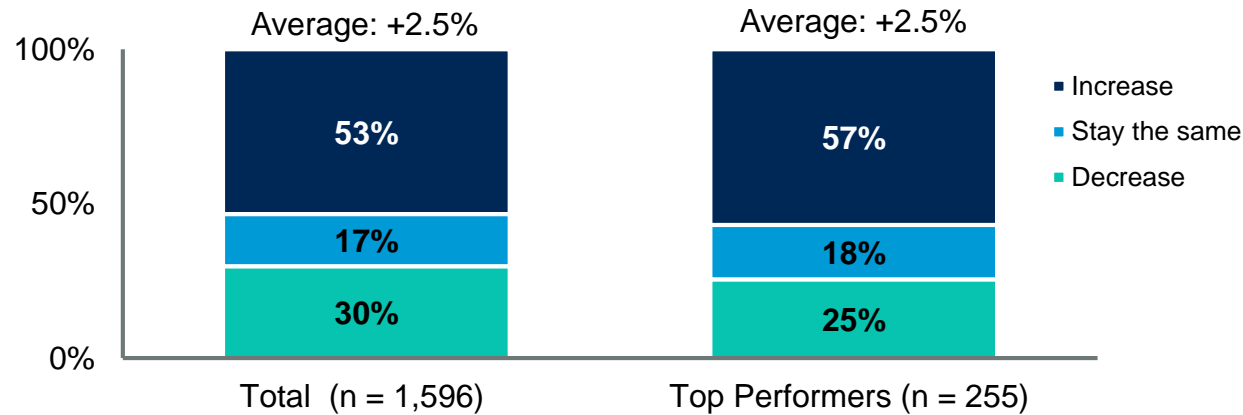
Q. By what percentage do you expect your enterprise's IT budget to increase or decrease from 2020 to 2021?

Source: 2021 Gartner CIO Survey

Despite the Setbacks of 2020, Most Enterprises Worldwide Should See Overall and IT Budget Increase in 2021

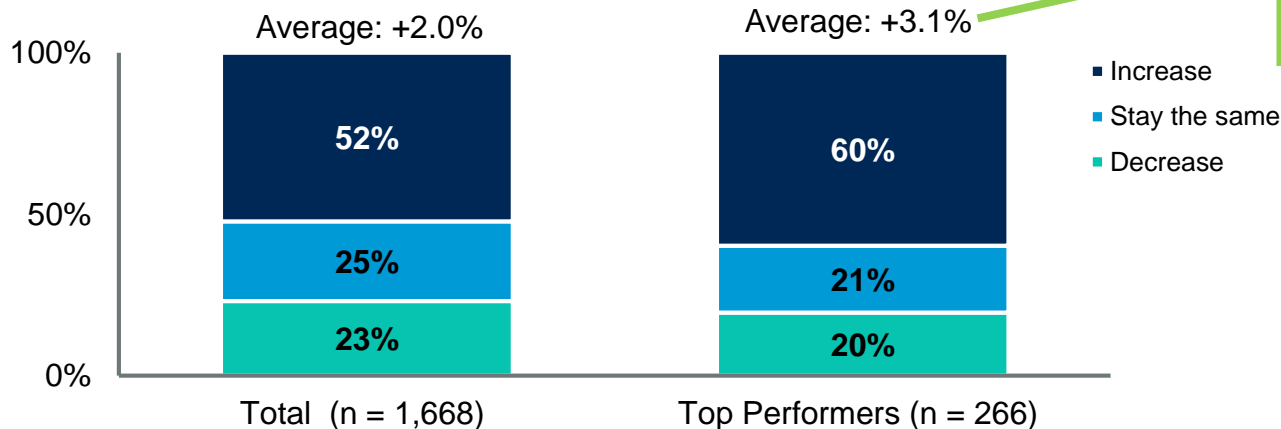
Expected Changes in Overall and IT Budget in 2021
Percentage of Respondents

OVERALL BUDGET



n varies by segment, Excludes "Don't know"
Q. By what percentage do you expect your enterprise's revenue/overall budget/turnover to increase or decrease from 2020 to 2021?
Source: 2021 Gartner CIO Survey
ID: 738401

IT BUDGET



Notice that only Top Performers' IT Budget increase more than their Overall Budget

n varies by segment, Excludes "Don't know"
Q. By what percentage do you expect your enterprise's IT budget to increase or decrease from 2020 to 2021?
Source: 2021 Gartner CI Survey
ID: 738401

In Catalunya...

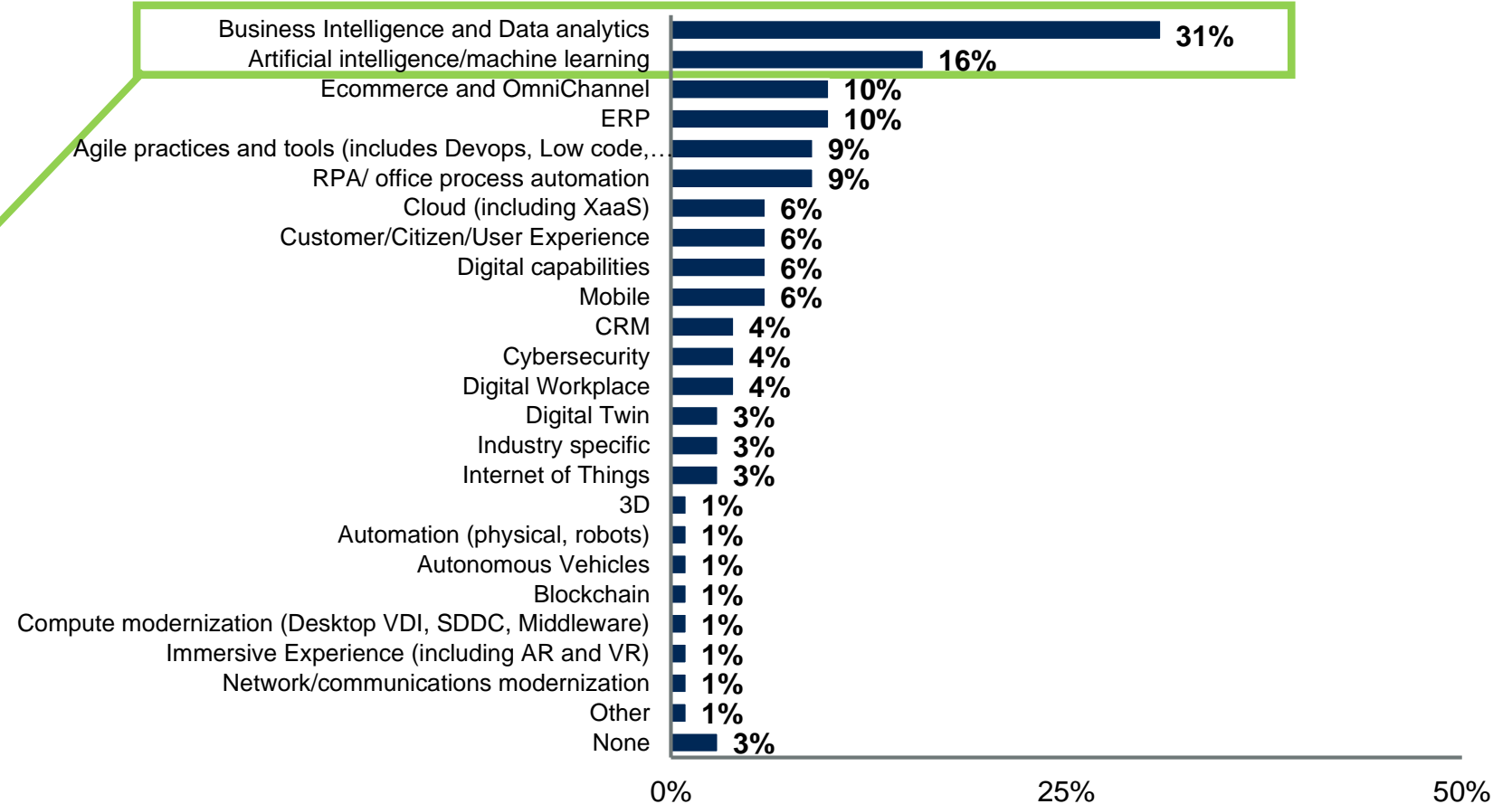
**Game-Changing
Technologies Are the
Same as Worldwide, but in
the opposite order**

“Game Changers” for Catalunya: Technologies that will Lead to a Breakthrough in the Enterprise

Game-changer Technologies Percentage of Respondents

Once again, **D&A and AI** are by far considered the game changers going forward in Spain and Portugal

For your reflection:
The CIO universe worldwide puts more emphasis on **AI** than on **D&A**



n = 67 Catalunya respondents, Excludes "Don't know/No answer"
 Q. Which technology area do you expect will be a “game changer” for your enterprise in 2021?
 Source: 2021 Gartner CIO Survey
 Coded open-text responses. Multiple responses allowed.

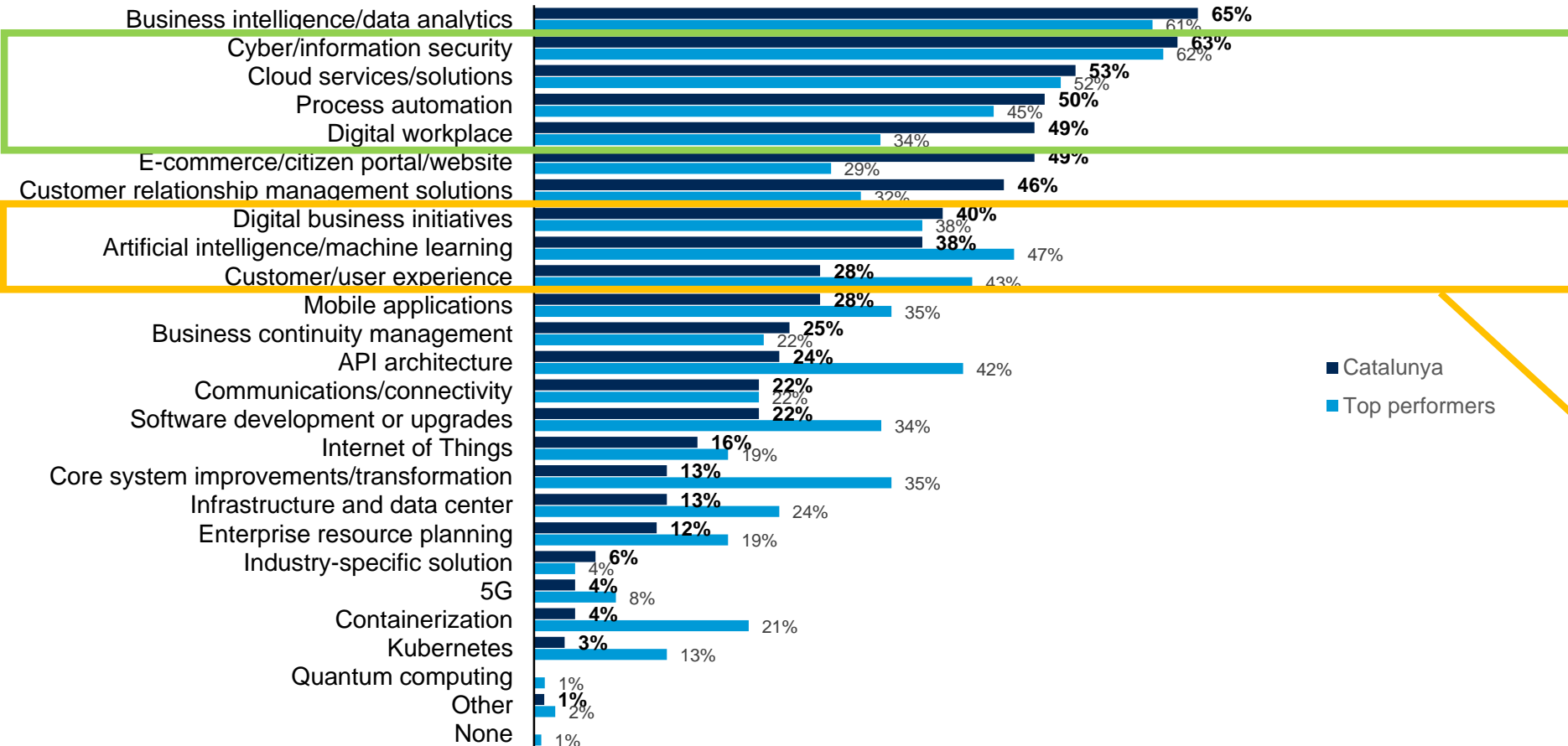
In Catalunya...

**However, CIOs Will Put the
Money Somewhere Else...**

Data Analytics and Security Are the Top 2021 Plans

Technology Areas for New Funding in 2021

Percentage of Respondents



Investments related to **remote work** appear to be taking the lead

Keep a close eye on these investments, key for growth – AI was 2nd position last year... now it is 9th

Keep a close eye on these investments, key for growth – AI was 2nd position last year... now it is 9th

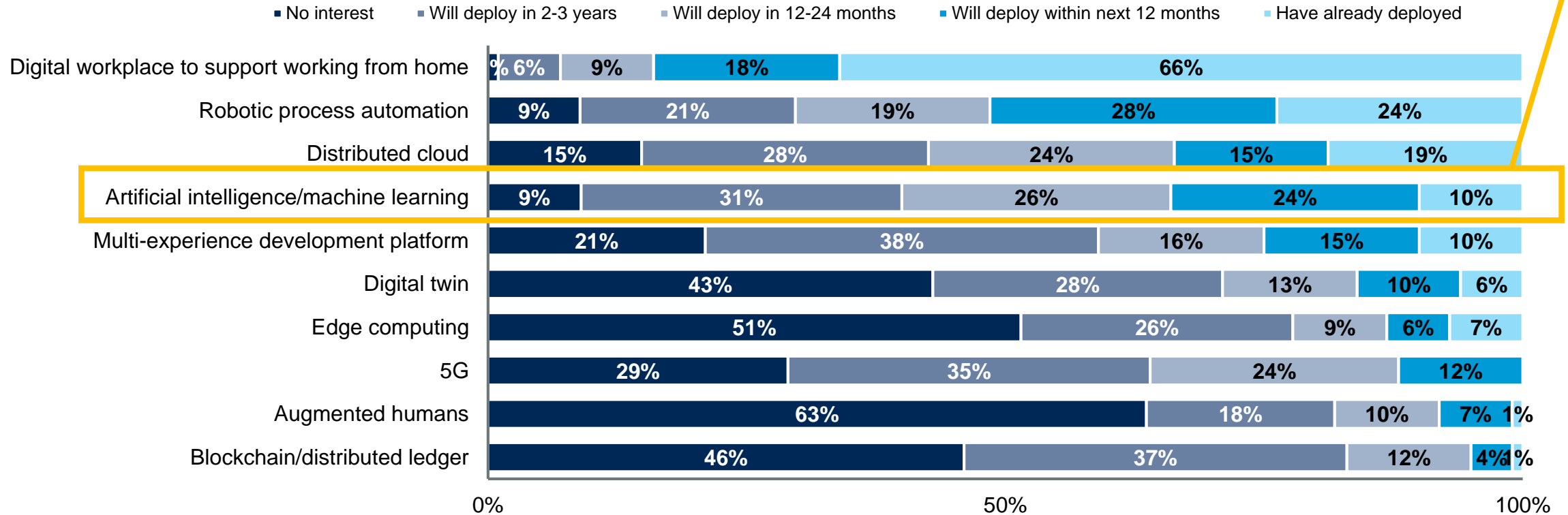
n = 68 Catalunya respondents ,289 (Top performers) Excludes "Not sure"
 Q. What are the technology areas where your enterprise will be spending the largest amount of new or additional funding in 2021 compared with 2020?
 Source: 2021 Gartner CIO Survey
 ID: 738401

Digital Workplace Has Surged in 2020

You'd better advance **deployment of AI** as much as possible

Adoption Plans for Emerging Technologies

Percentage of Respondents



n = 68 Catalunya respondents

Q. What are your enterprise's plans in terms of the following digital technologies and trends?

Source: 2021 Gartner CIO Survey

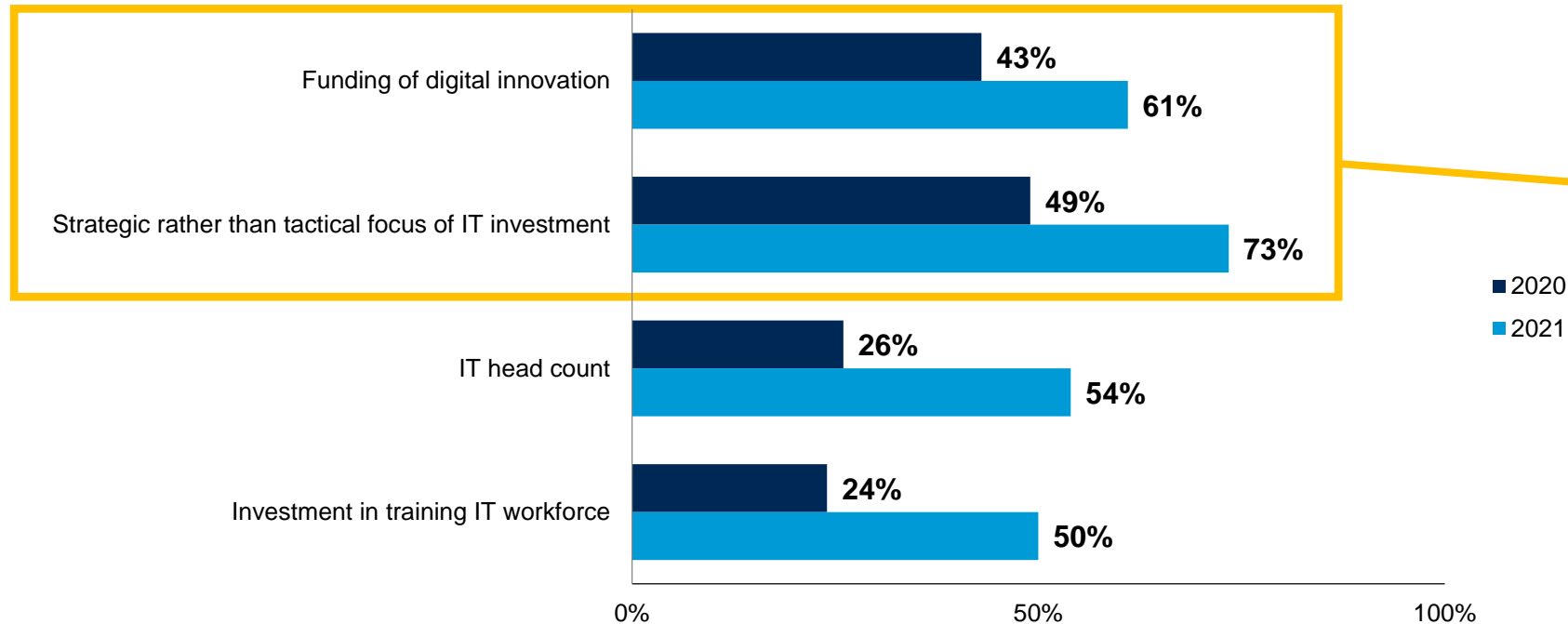
In Catalunya...

**The Challenge Will Be To
Deliver the Promise on the
Agreed-Upon Areas of
Investment**

Disruption Put A Spotlight On IT

Changes in IT Due to COVID-19 and Expected in 2021

Percentage of Catalunya Respondents reporting/expecting an increase



Ensure 2021 investments are oriented to **Digital Innovation** and **Strategic Initiatives** (i.e. Walk the Talk)

n = ~69 Catalunya respondents, Excludes "Not sure/Not applicable"

Q. How would you characterize the changes that have occurred in your enterprise as a result of the COVID-19 pandemic in each of these areas?

vs How do you expect these aspects of your enterprise to change in 2021 compared with their status today?

Source: 2021 Gartner CIO Survey

ID: 123456

Recommendations (1/2)

Focus on IT Smart Spending Criteria

You expect to be given more money. And you probably will get it -and in huge amounts- because your company needs to accelerate their digital business transformation... but you will not be allowed to manage it necessarily. You will be under a severe scrutiny unless you prove you apply smart spending criteria.

Cost cutting in times of recession and generous spending in times of prosperity –or when you’ve got the money- are short term actions that can harm the longer term growth of your company and your reputation. Your decisions must be driven by business value at all times. Smart Spending means making expense and investment decisions based on the **“amount of sustainable business”** they will produce, not on the automatic reactions led by the sign of times.

Ensure your IT initiatives are aligned with your company’s digital strategy

It is critical for the buy-in of your initiatives by the C-Suite.

Follow the advice in [“CIOs Must Master Four Views of Spend to Manage IT Finances”](#) (G00382040).

Revisit all your spending plans to reallocate funding to digital innovation

Apply the 3 magical questions your CEO wants an answer for:

- ‘How much revenue will that initiative give us?’
- ‘How much cost will it save?’
- ‘Which risks will it mitigate?’

See [“Spend Smarter to Accelerate COVID-19 Recovery and Renewal”](#) (G00727064) to identify momentous focus areas.

Create a culture of smart spending in your IT organization -which is not just cost-cutting

Learn how to achieve it in [“Create a Culture of IT Smart Spending”](#) (G00725352).

Do not limit it to your management team, ensure that it cascades down to all levels of the organization.

Recommendations (2/2)

Do Not Fall Prey to Enhancing Remote Work Experience As Your First Priority

You want to improve the technological conditions of remote workers, and that is great. And most likely you will be pushed by the rest of business areas to do it. However, remember that you are not paid to do what you are told to do but to do what brings more business value.

Do not overlook the game-changing technologies and initiatives that will grow your business going forward. Otherwise you will be remembered as ‘the guy who enabled remote work for us’ instead of ‘the guy who brought us more business value’.

Start/Keep putting a close eye on AI

- If you have not explored AI yet, learn how to start providing your company with value from AI in [“What Is Artificial Intelligence? Seeing Through the Hype and Focusing on Business Value”](#) (G00730970).
- If you have already started implementing AI at some extent, expand its possibilities with the information and advice you will get in [“2021 Planning Guide for Data Analytics and Artificial Intelligence”](#) (G00732258) and [“Five Ways Artificial Intelligence and Machine Learning Deliver Business Impacts”](#) (G00431403).
- Use MVPs to keep the enterprise engaged.

Identify patterns about potential markets to grow the business

In conjunction with the rest of business units, use data analytics and predictive analysis to **discern patterns** about potential markets to grow. See [“When and How to Combine Predictive and Prescriptive Techniques to Solve Business Problems”](#) G00723079).

Revise -and remake, if necessary- your Customer Experience Strategy in the wake of the pandemic

See [“The Essence of a Customer Experience Strategy”](#) (G00720549). 43% of top performers worldwide have deployed or plan to deploy multiexperience development platforms for synchronizing the customer experience across channels. And nearly 40% plan to increase their investment in customer experience, CRM and e-commerce or citizen-service portals in 2021

Recommended Gartner Resources

[CIOs Must Turn to Business Challenges to Sustain Their Crisis Momentum](#) G00731003

[The 2021 CIO Agenda: Seize This Opportunity for Digital Business Acceleration](#) G00734780

[Solve Your Chronic Problems Before They Kill the Business](#) G00466038

[Follow 5 Steps to Architect Your Enterprise Operating Model](#) G00377025

[Gartner Essential Frameworks](#) G00724610

[Three Steps to Hyperautomation](#) G00728868

A Gartner EXP Initiative in collaboration with CIOs.cat

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