

Gartner 2022 CIO and Technology Executive Survey: A Catalan Perspective

Jordi Escalé, VP & Team Manager
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2022 CIO and Technology Executive Agenda for Catalonia

1 de Febrer, 17:00, Virtual (*)

17.00 Benvinguda de CIOs.Cat, Gartner, Generalitat de Catalunya

17.30 Gartner CIO Survey per a Catalunya, una visió
internacional

18.30 Presentació de les dades clau sobre la situació actual
del teletreball i de la seguretat (CIOsCat)

19.30 Conclusions

* Acte només per invitació

Presentan:

David Ferrer, Secretari de Polítiques Digitals, Generalitat de Catalunya

Luis Miguel Martín, President, CIOsCat

Catalina Grimalt, Vice-Presidenta, CIOsCat

Jordi Escalé, VP & Team Manager, Gartner

Fabrizio Magnani, Sr Executive Partner, Gartner

Daniel Sánchez-Reina, VP Analyst, Gartner

Executive Summary

We are living through a time of great uncertainty and volatility. Forces such as COVID-19, civil unrest, climate change and the shifting economy have made it more difficult for enterprises to plan their next move. The 2022 Gartner CIO and Technology Executive Survey shows that **mastering business composability** makes CIOs and other technology executives better prepared to maximize business value delivery during this period of volatility and beyond.

This presentation contains the specific analysis of the situation and challenges of CIOs and Technology Executives from Catalonia and a benchmark with their worldwide counterparts. This document includes responses from 49 organizations and has been possible thanks to the collaboration and support of CIOs.Cat association (representing the CIOs community in Catalonia) and Generalitat de Catalunya.

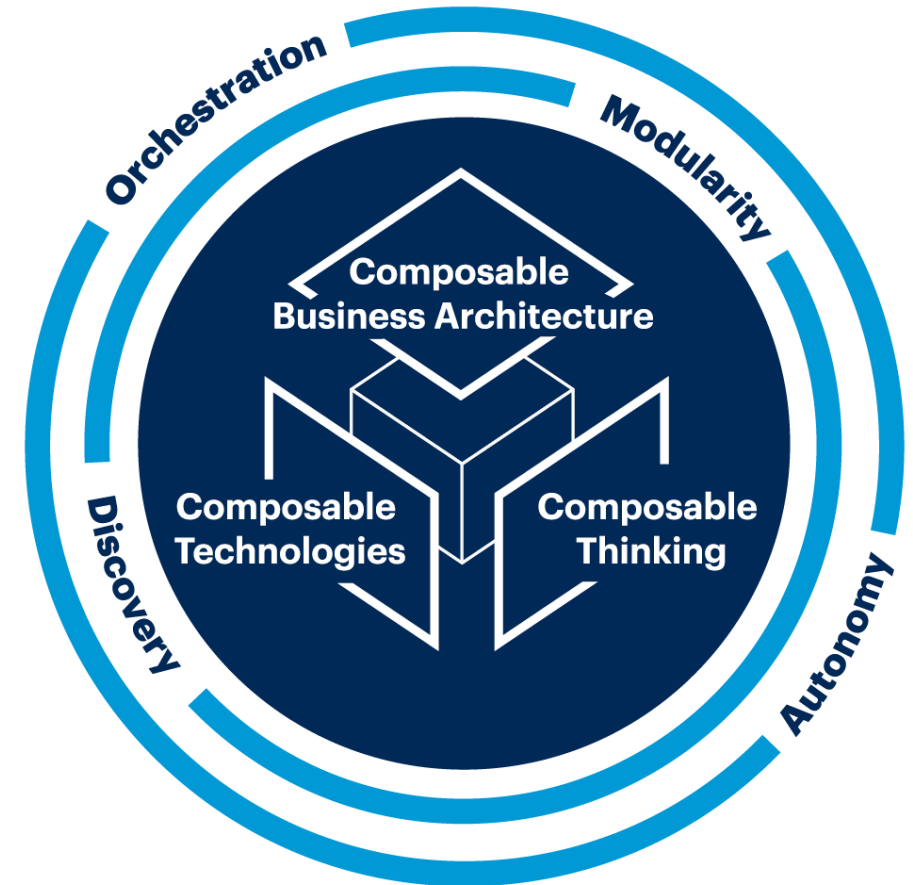


What Is Business Composability?

Composable business derives from a combination of mindset, practices and tools that enable enterprises to sense and respond to changing business conditions. Its three components are:

- Composable thinking
- Composable business architecture
- Composable technologies

Composable Business



Source: Gartner
735943_C

The Secret Sauce is “Business Composability”

Low Business Composability

- 1. Not at all
- 2. Rarely
- 3. Somewhat

Moderate Business Composability

- 4. Limited (e.g., in specific business units)
- 5. Common in several (but not most) business units

High Business Composability

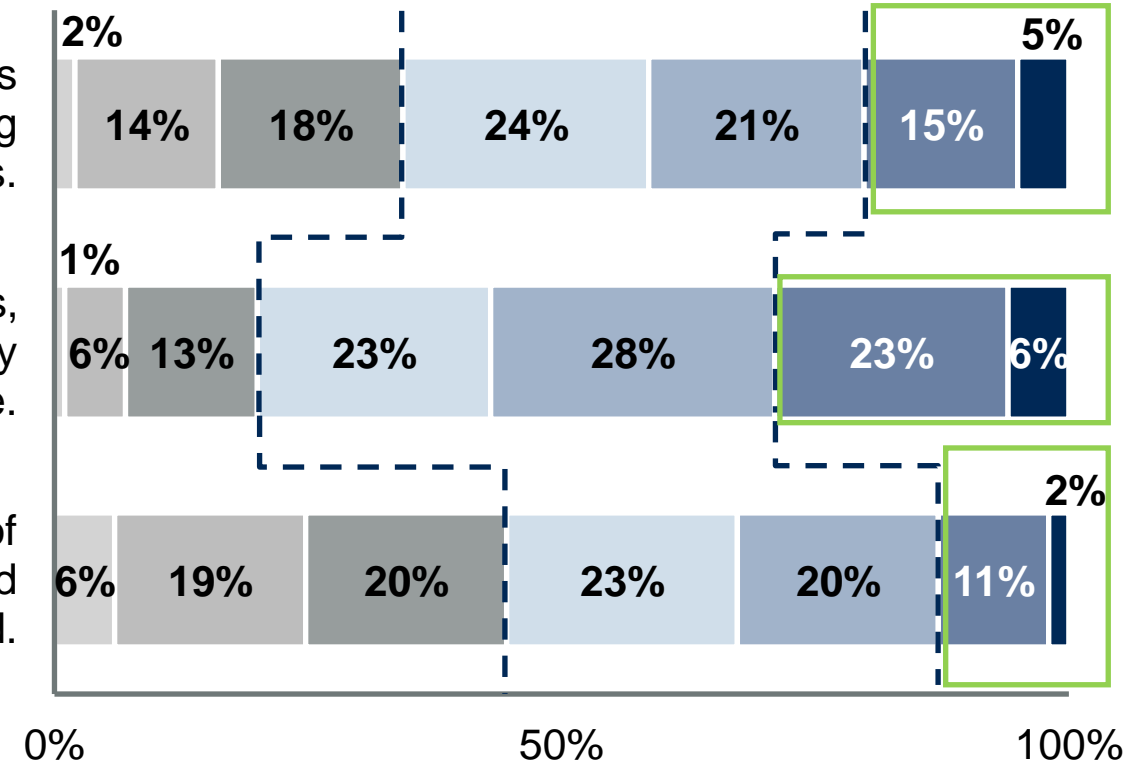
- 6. Widely
- 7. Extensively throughout the enterprise



Our culture encourages the continuous exploration and creation of game-changing business capabilities.

Business elements (e.g., capabilities, products, teams, processes, services, etc.) dynamically evolve to create new value.

Technology assets and capabilities consist of modular components where assembly and reassembly are automated.



n = 2387, All respondents, excluding "Not Applicable"
 Q. To what extent does your enterprise utilize these principles?
 Source: 2022 Gartner CIO and Technology Executives Survey
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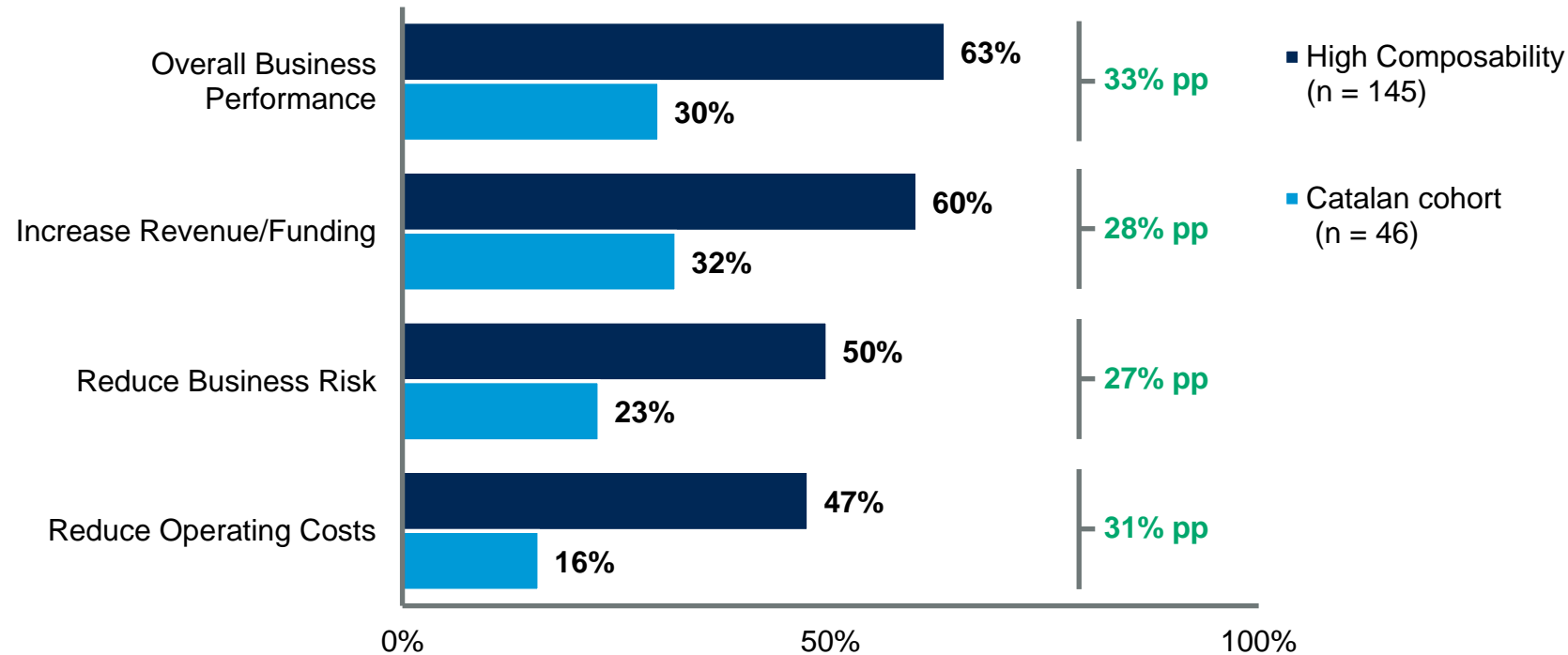
Why Business Composability Matters



High Business Composability Delivers Superior Business Performance, Even in Times of Volatility

Enterprise Business Performance

Percentage of Respondents Ahead or Far Ahead of Peers and Competitors



The more
'Composable'
your Business
is, the higher
Business
Performance you
will get

n varies by segment, CIOs and technology executives answering, excluding don't know

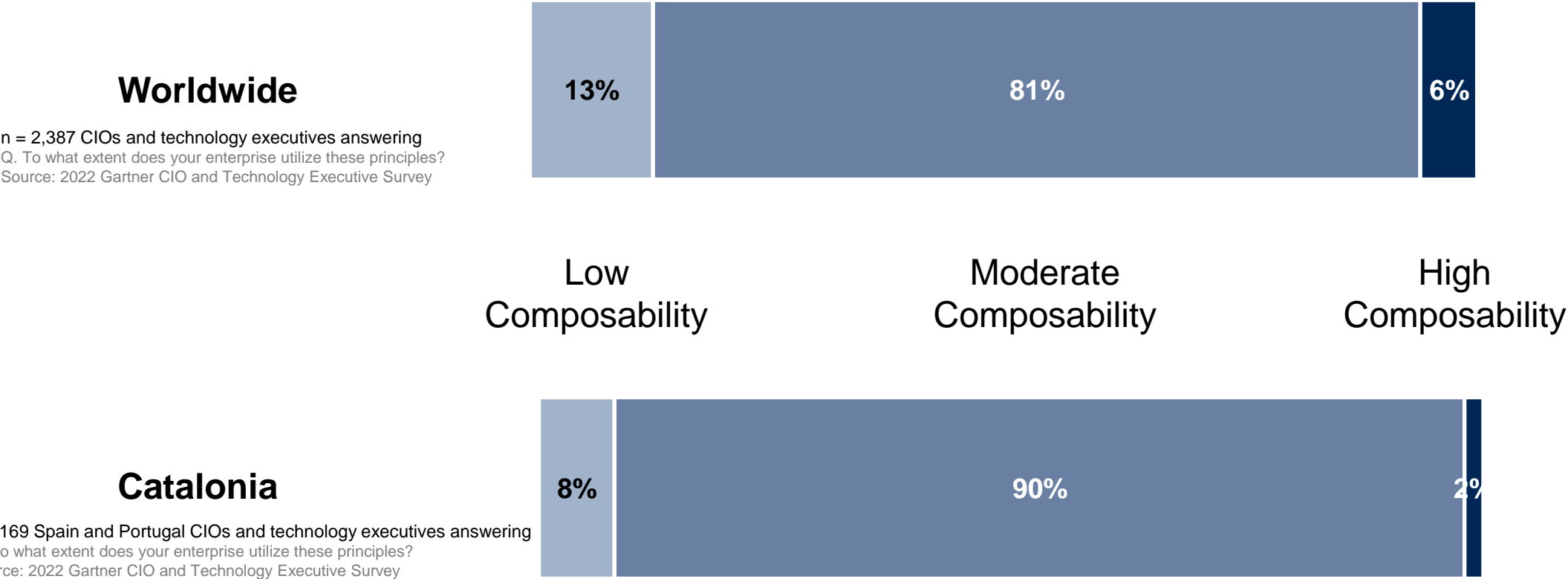
Q. Considering the past 12 months, rate your enterprise's business performance compared with its peers or competitors.

Source: 2022 Gartner CIO and Technology Executive Survey

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Only a Few Enterprises Are Really Good at Business Composability



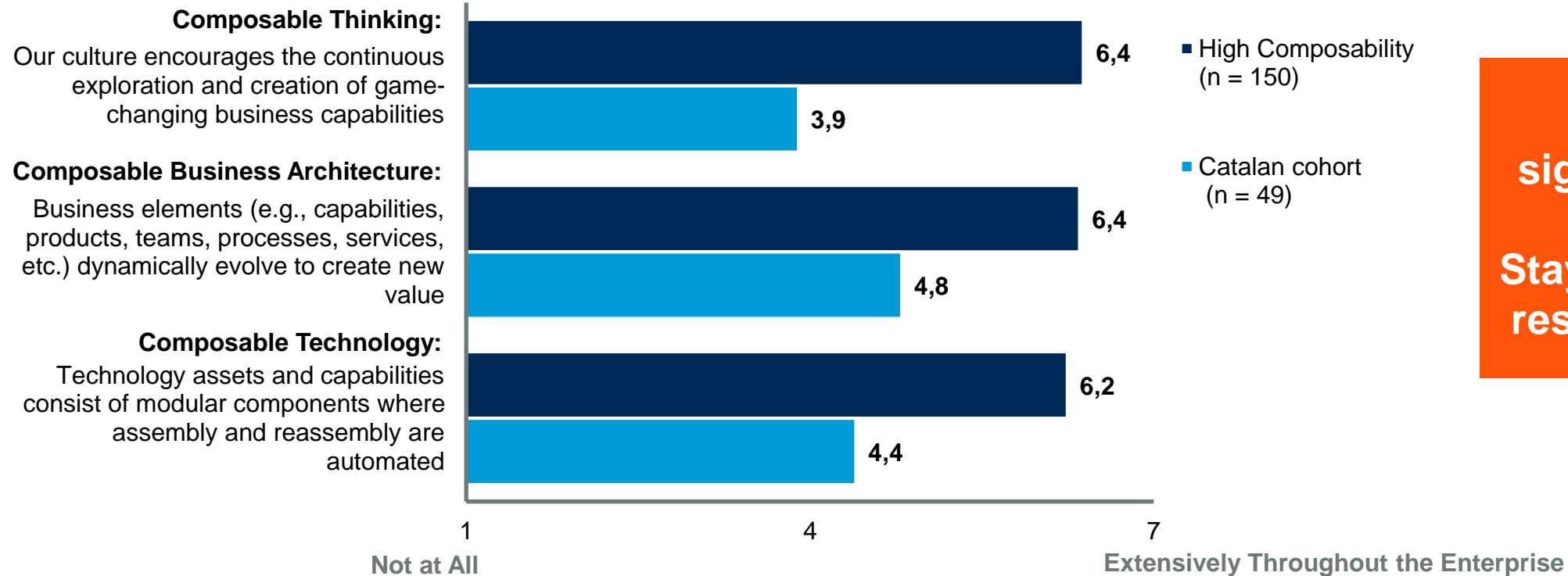


Business Composability Revealed

Composable Enterprises Utilize Three Principles

Extent of Composability

Average Scores on a Scale of 1 (Not at All) to 7 (Extensively Throughout the Enterprise)



There are significant gaps to fill. Stay tuned for the rest of the slides

n varies by segment, CIOs and technology executives answering

Q. To what extent does your enterprise utilize these principles?

Source: 2022 Gartner CIO and Technology Executive Survey

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Macroeconomic Perspective for Catalonia



Macroeconomy – Catalonia

Positive Economic Outlook!



Investments are returning to pre-pandemic levels

Fixed Capital Formation (FCF = increment of stock of fixed capital) is increasing: E.g. investing in new equipment, building a new factory...



High attractiveness as a Startup Hub

Barcelona among the Top-5 Startup Hubs in the EU



High attractiveness for foreign investors

Due to high quality of infrastructures (transportation and telecomms), human capital and quality of life.



The New Startup Law in Spain

- Attractive tax exemption for startups and their stock owners
- 5-year visa for foreign entrepreneurs and nomad workers

Source: Several EU institutions

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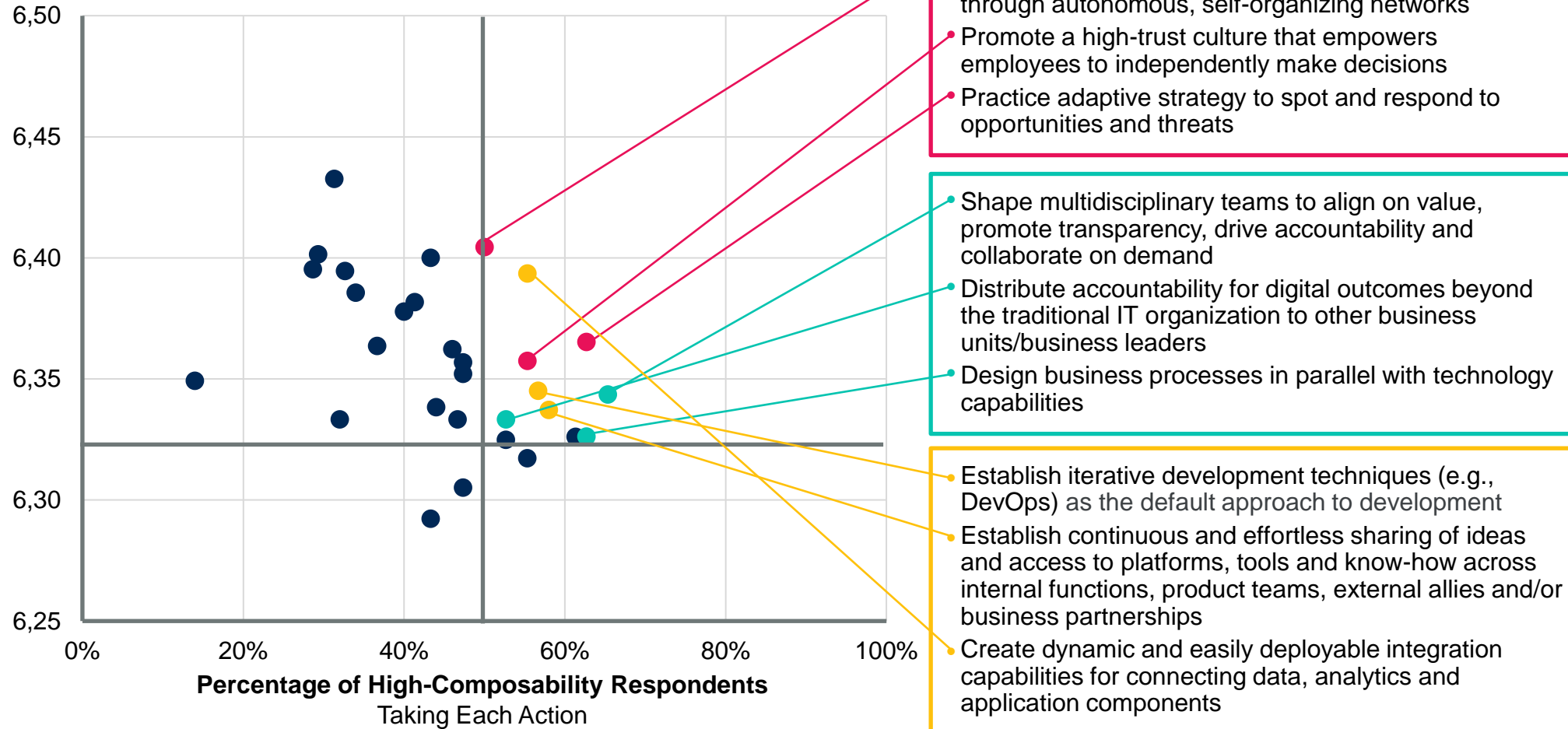


Composable Enterprises Follow Key Practices



Nine Practices Distinguish Highly Composable Enterprises

Average Composability for High-Composability Respondents Who Follow This Practice (1-7 Scale)



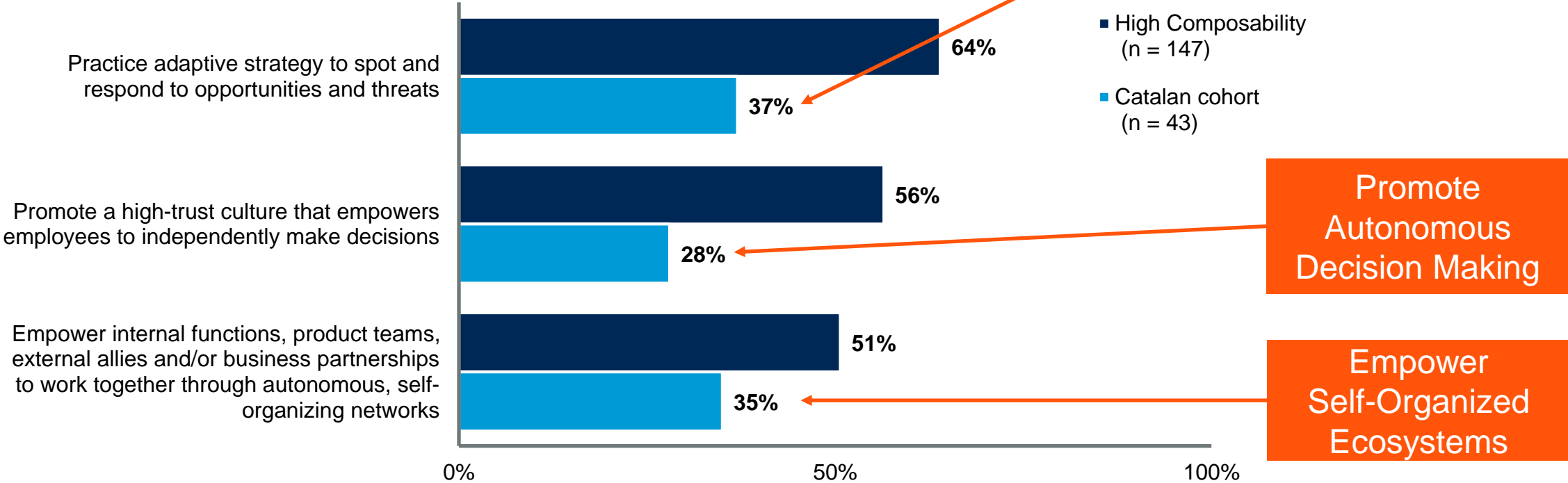
n = 148 CIOs and technology executives from highly composable enterprises answering Q. Which of these practices does your enterprise follow completely and consistently? Multiple responses allowed. Source: 2022 Gartner CIO and Technology Executive Survey



Composable Thinking

Key Composable Thinking Practices

Key Thinking Practices to Improve Business Composability
Percentage of Respondents Who Perform It



n varies by segment, CIOs and technology executives answering
Q. Which of these practices does your enterprise follow completely and consistently?
Source: 2022 Gartner CIO and Technology Executive Survey

Recommendations



Adaptive Strategy

- Use **scenario-based planning** to uncover hidden risks and potential new value propositions
- Review and adapt your strategy regularly, moving away from just annual strategy cycles and budgets to more iterative **shorter cycles**

[“Connection to the Future” Scenario-Planning Workshop](#)

[Toolkit: Getting Started With Adaptive Strategy](#)



Autonomous Decision Making

- Establish a **‘decision making chart’**, whereby teams know in which situations they are expected to make their own decisions (cost-based, topic-based,...)
- Reward those employees who **accept and learn from their mistakes** and share their lessons-learned openly

[Expert Insight Video: Building Metrics That Influence Business Decision Making](#)

[How To Help Your Team Develop New Behaviors](#)



Self-Organized Ecosystems

- Become a partnerships expert: fuel innovation by promoting **ecosystem partnerships** to pioneer new disruptive ideas and capabilities

[Leverage Strategic Partnerships to Drive Digital Business Outcomes](#)

[8 Ways Ecosystems Supercharge Digital Business Models](#)

Polling Question 1 of 3

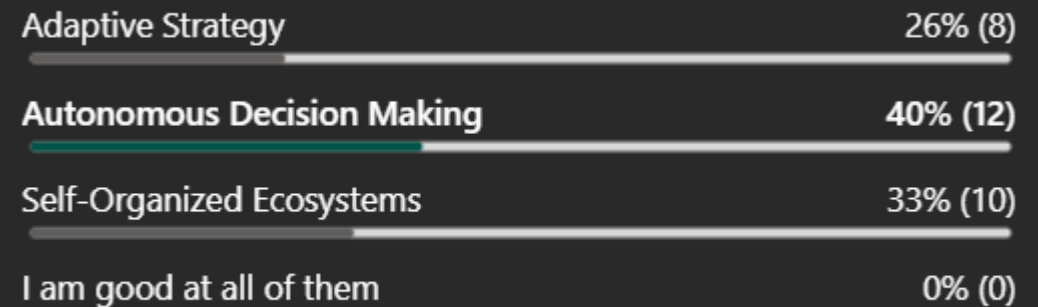
Question

In which Composable Thinking key practice do you have more room for improvement?

- A. Adaptive Strategy
- B. Autonomous Decision Making
- C. Self-Organized Ecosystems
- D. I am good at all of them

EXTRA:

Answers from the live mini-survey live proposed during the presentation of this research:

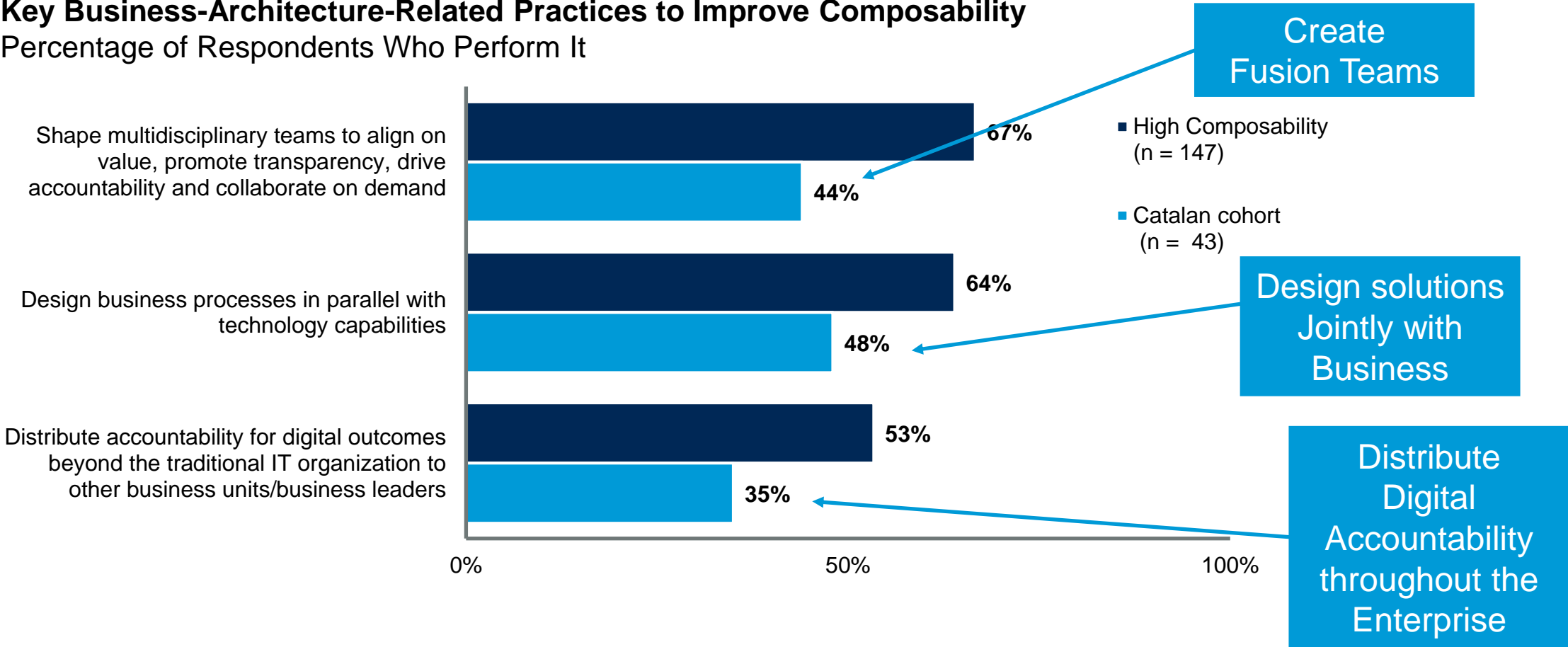




Composable Business Architecture

Key Composable Business Architecture Practices

Key Business-Architecture-Related Practices to Improve Composability Percentage of Respondents Who Perform It



n varies by segment, CIOs and technology executives answering
Q. Which of these practices does your enterprise follow completely and consistently?
Source: 2022 Gartner CIO and Technology Executive Survey

Recommendations



Fusion Teams and BizTech Design

- Use **customer journeys and corresponding metrics** to shift from uncoordinated siloed efforts to integrated actions, between IT and the rest of the business areas
- Launch smaller, autonomous, agile **cross-functional teams** accountable for product vision

[Video: How to Build and Use a Customer Journey Map](#)

[Video: What Are Fusion Teams and Why Do CIOs Need Them?](#)



Distributed Digital Accountability

- **Democratize Data** to foster autonomy in generating insights
- Invest time to identify the **sources of digital friction in non-IT employees** and draw up a plan to sort them out in the very short term
- Provide tools and learning to **non-IT employees who want to create** useful applications for their functional areas
- Orchestrate **communities of technology producers ('business technologists')** inside and outside IT that curate and co-create solutions

[Quick Answer: Who Are Business Technologists, and Why Do They Matter for CIOs?](#)

[The Changing Nature of Work: How to Eliminate Digital Friction to Boost Productivity and Resilience](#)

Polling Question 2 of 3

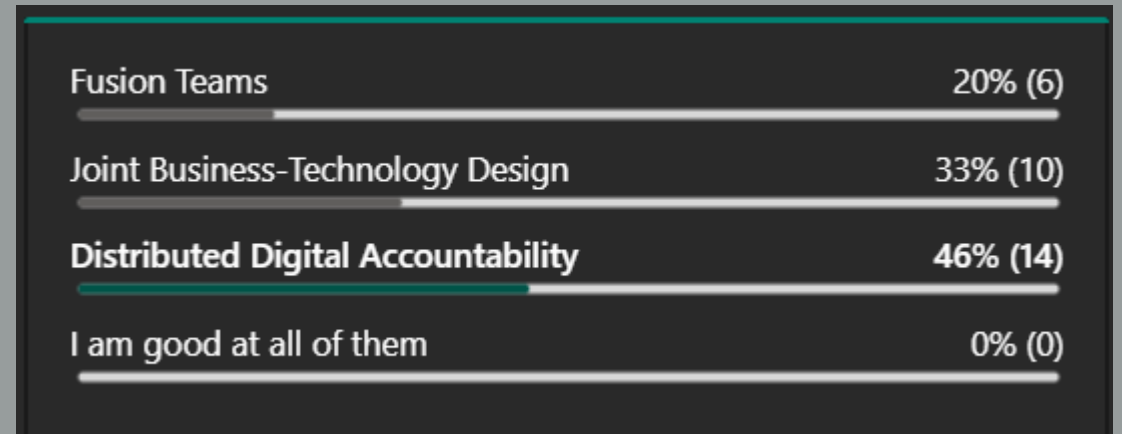
Question

In which Composable Business Architecture key practice do you have more room for improvement?

- A. Fusion Teams
- B. Joint Business-Technology Design
- C. Distributed Digital Accountability
- D. I am good at all of them

EXTRA:

Answers from the live mini-survey live proposed during the presentation of this research:

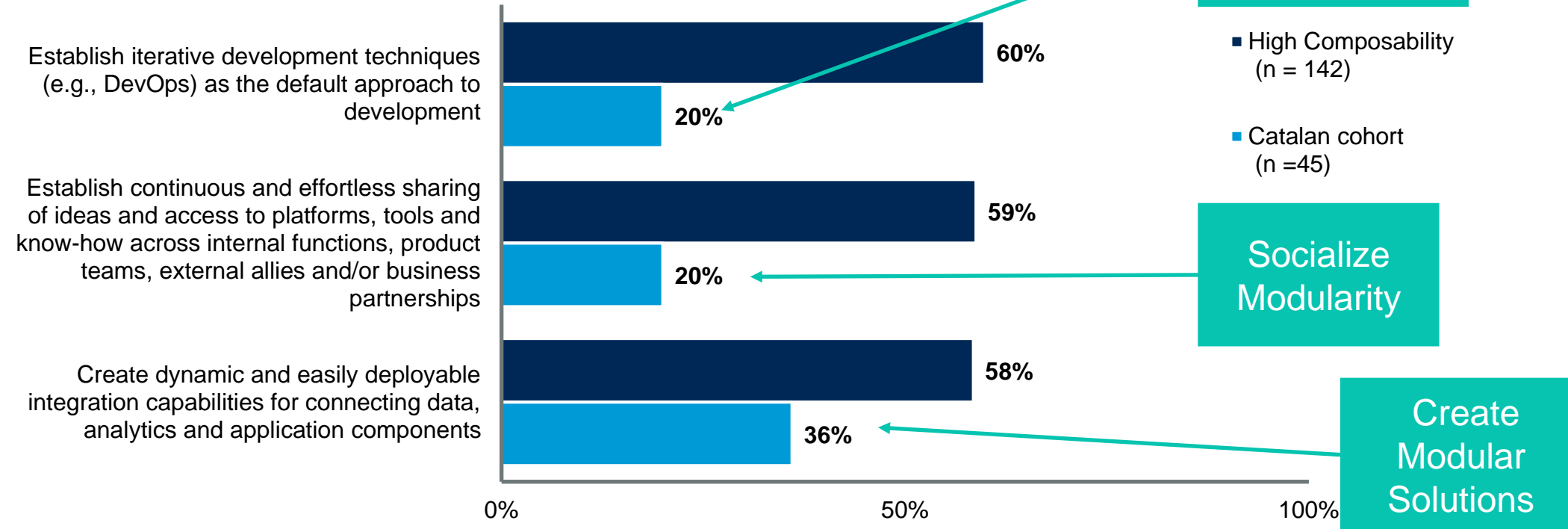




Composable Technologies

Key Composable Technology Practices

Key Technology-Related Practices to Improve Composability Percentage of Respondents Who Perform It



n varies by segment, CIOs and technology executives answering

Q. Which of these technology-related practices does your enterprise use completely and consistently?

Source: 2022 Gartner CIO and Technology Executive Survey

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Recommendations



Iterative Developments

- Acquire the habit of breaking developments into smaller parts (**MVPs**), under a **DevOps scenario**
- Eliminate or **automate non-value-added work** to improve delivery cycle time

[Solution Path for Continuous Delivery With DevOps](#)

[Tool: DevOps Engineer Job Description](#)



Socialization of Modularity

- Establish **regular encounters** between internal (IT and non-IT) and external partners, to share success stories about utilizing platforms and tools

[Establish Social and Community Experiences as Essential Digital Workplace Capabilities](#)

[Platform-Enabled Citizen Development \(BP\)](#)



Modular Solutions

- Invest in **integration capabilities** (including an integration platform and the corresponding skills) to develop strongly encapsulated, loosely coupled, independently deployable and **scalable applications and services**

[How to Implement Composable Technology With PBCs](#)

[Quick Answer: How to Implement a Composable ERP Strategy?](#)

Polling Question 3 of 3

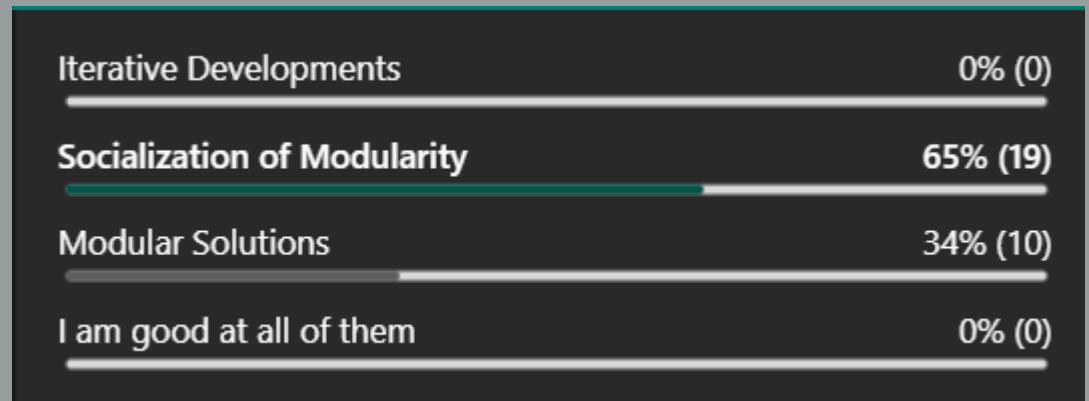
Question

In which Composable Technology key practice do you have more room for improvement?

- A. Iterative Developments
- B. Socialization of Modularity
- C. Modular Solutions
- D. I am good at all of them

EXTRA:

Answers from the live mini-survey live proposed during the presentation of this research:



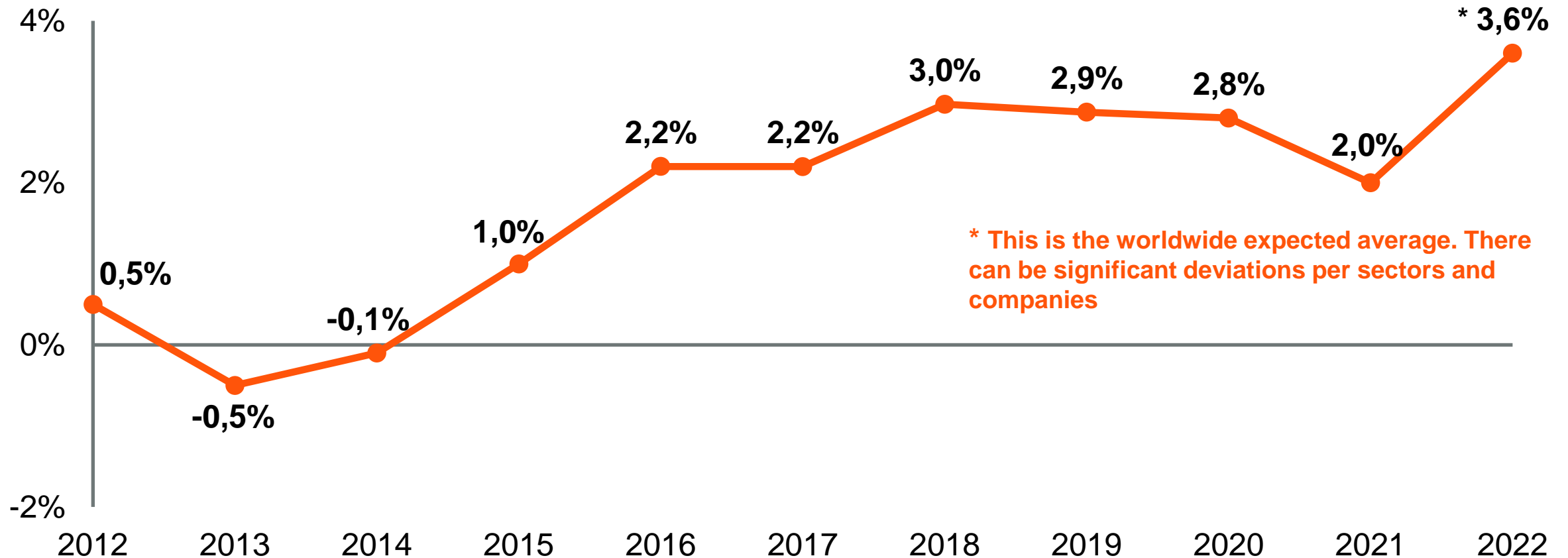


2022 Spending Plans and Technology Trends



Worldwide 2022 IT Budgets Are Back in Growth

Global Expected Average Change in Enterprise IT Budgets



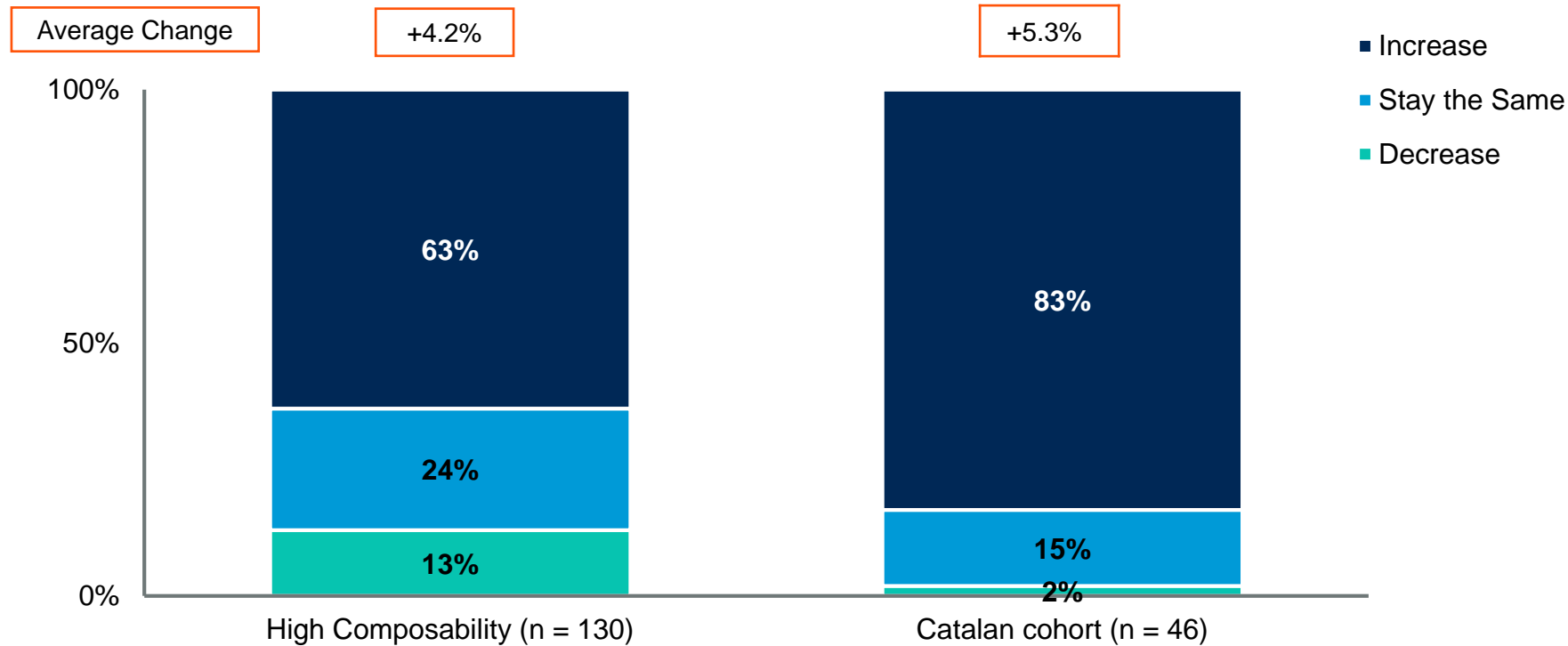
n = 2017 (n = 2,198), 2018 (n = 2,659), 2019 (n = 2,643), 2020 (n = 991); 2021 (n = 1,668); 2022 (n = 1913) Excludes "don't know/no answer"

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

Source: 2022 Gartner CIO and Technology Executive Survey

Catalonia: Average 5,3% Increase in 2022 IT Spending

Expected Change in IT Budget in 2022 Percentage of Respondents



On average, IT budgets in Catalonia are expected to grow more than those of High-Composable enterprises

n varies by segment, CIOs and technology executives answering

Q. By what percentage do you expect your enterprise's IT budget to increase or decrease from 2021 to 2022?

Source: 2022 Gartner CIO and Technology Executive Survey

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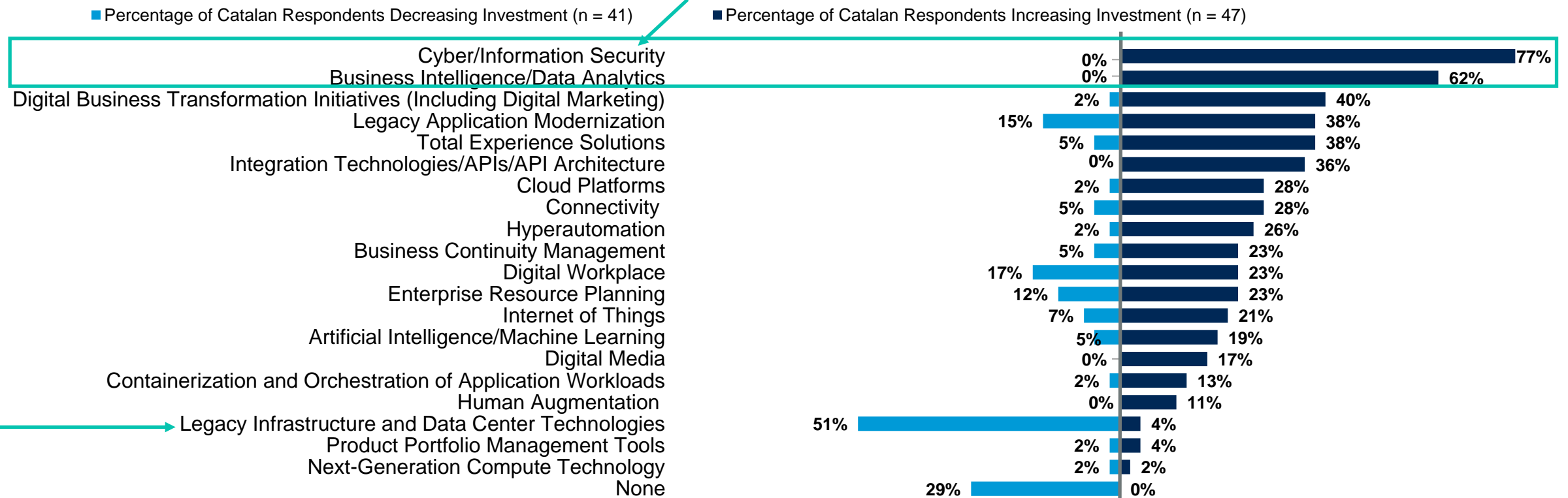
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Enterprises Will Rebalance Their Technology Portfolios

Changes in Technology Investments

Percentage of Catalan Respondents

Investments in Cybersecurity and D&A continue to grow



The Great Disinvestment in legacy infrastructures

n varies by question, Catalan respondents, excluding not sure

Q. What are the technology areas where your enterprise will be spending the largest amount of new or additional funding in 2022 compared with 2021?

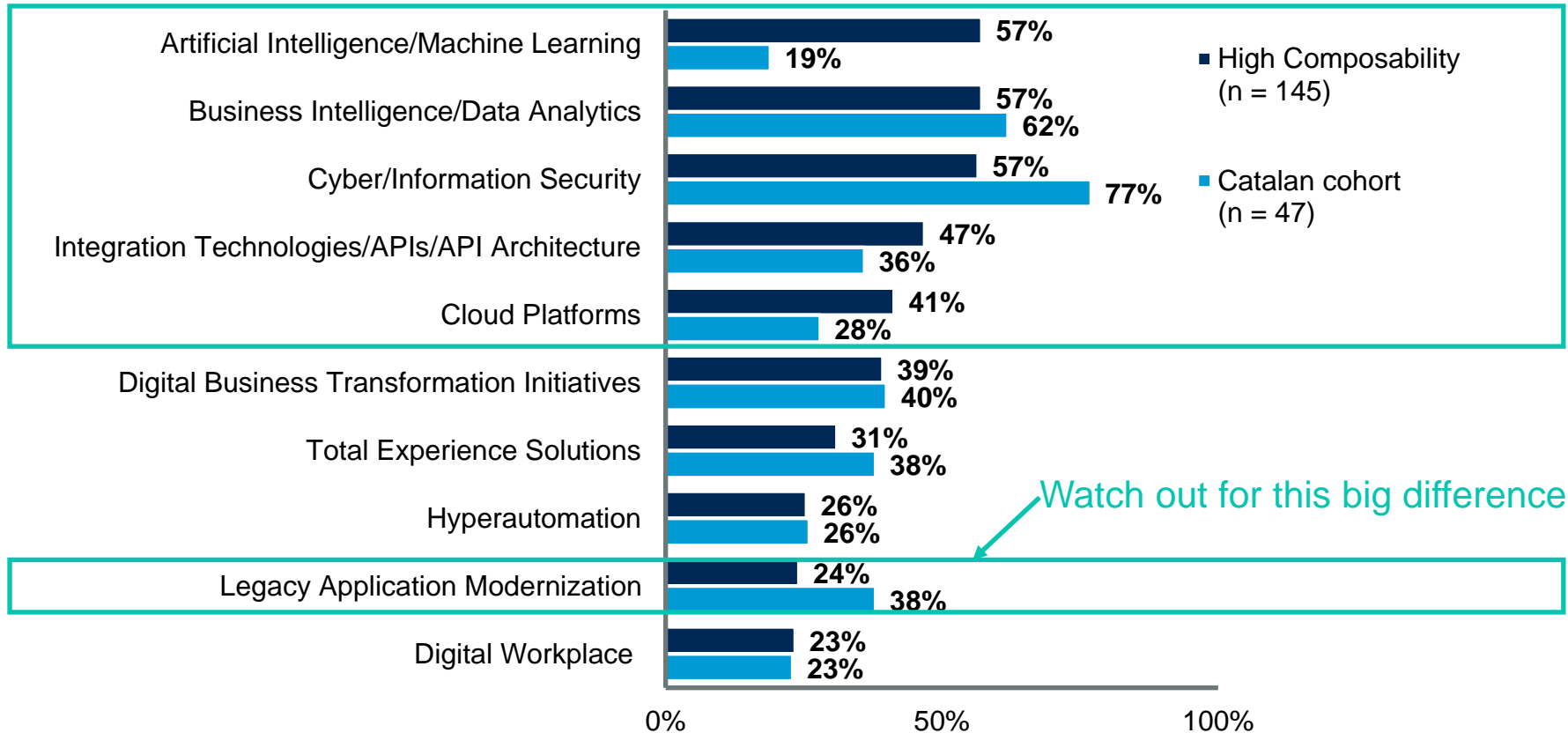
Q. What are the technology areas where your enterprise will be reducing funding by the highest amount in 2022 compared with 2021?

Source: 2022 Gartner CIO and Technology Executive Survey

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High-Composability Enterprises' 2022 Investment Priorities

Top 10 Technology Investment Areas for 2022 Among Highly Composable Enterprises Percentage of Respondents



In Catalonia:

- AI is still underrated
- Great effort in D&A over the last years
- Excellent catch-up on cybersecurity
- Modularity abandons the underrated zone, although still room for progress
- Cloud still needs an additional effort in 2022

n varies by segment, CIOs and technology executives answering, excluding not sure

Q. What are the technology areas where your enterprise will be spending the largest amount of new or additional funding in 2022 compared with 2021?

Source: 2022 Gartner CIO and Technology Executive Survey

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Recommendations



Artificial Intelligence

- **Convey the business value of AI**, sharing real cases from other companies in your industry which have clearly provided **more revenue, and/or cost savings and/or risk mitigation**
- **Stop talking about AI and start putting it into action** seeking, along with your peers, opportunities to apply it

[5 Ways Artificial Intelligence and Machine Learning Deliver Business Impacts](#)

[Understanding Use Case Prisms for Prioritizing Artificial Intelligence Investments](#)



API Architecture

- **Modularize your IT value proposition** by developing APIs that will allow IT and non-IT employees to compose their business needs

[How to Design Great APIs](#)

[How to Deliver Sustainable APIs](#)

[How to Successfully Implement API Management](#)



From Good to Great

- D&A: **democratize data access and data processing**
- Cybersecurity: **rebalance accountability with business leaders**
- Cloud: **get freedom from legacy infrastructure and applications**

[Leadership Vision for 2022: Data and Analytics](#)

[CIOs Need to Rebalance Accountability for Cybersecurity With Business Leaders](#)

[Quick Answer: What Makes Industry Clouds Different From Today's Cloud Offerings?](#)

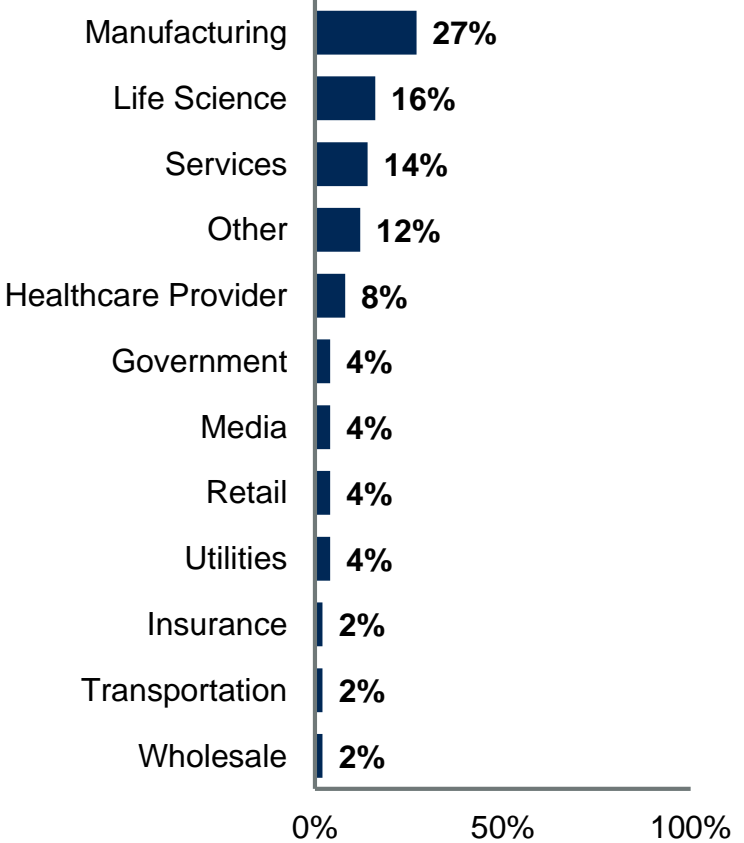
Recommended Gartner Research

- Q **Business Composability Helps You Thrive Amid Disruption**
Andy Rowsell-Jones, Tomas Nielsen and Others (G00751036)
- Q **The 2022 CIO and Technology Executive Agenda:
Master Business Composability to Succeed in Uncertain Times**
Andy Rowsell-Jones, Monika Sinha and Others (G00747542)
- Q **Build Effective Strategic Roadmaps in 3 Steps**
Monika Sinha, Joanne Kopcho and Others (G00752447)

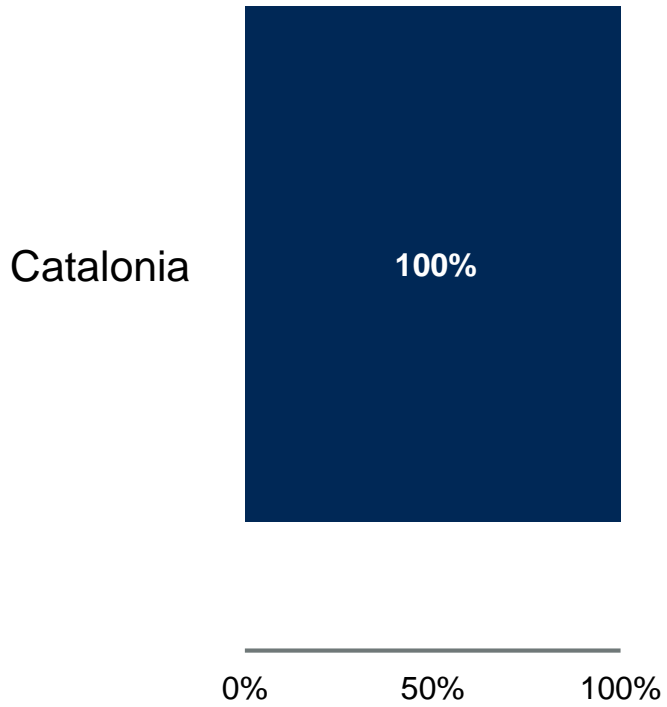
Sample Demographics and Survey Methodology

Respondent Profile: Industry and Location

Primary Industry



Location



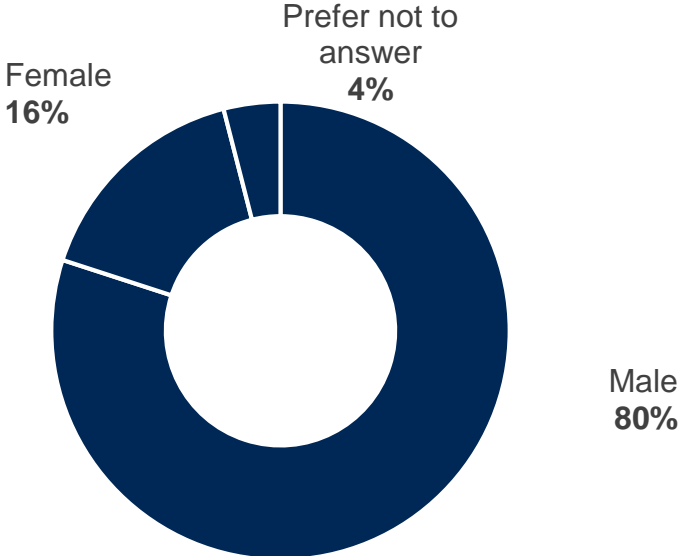
n = 49 Catalan CIOs and technology executives answering
Q. What is your enterprise's primary industry classification?
Q. Where is your primary worksite located?
Source: 2022 Gartner CIO and Technology Executive Survey



Respondent Profile: Gender and Role

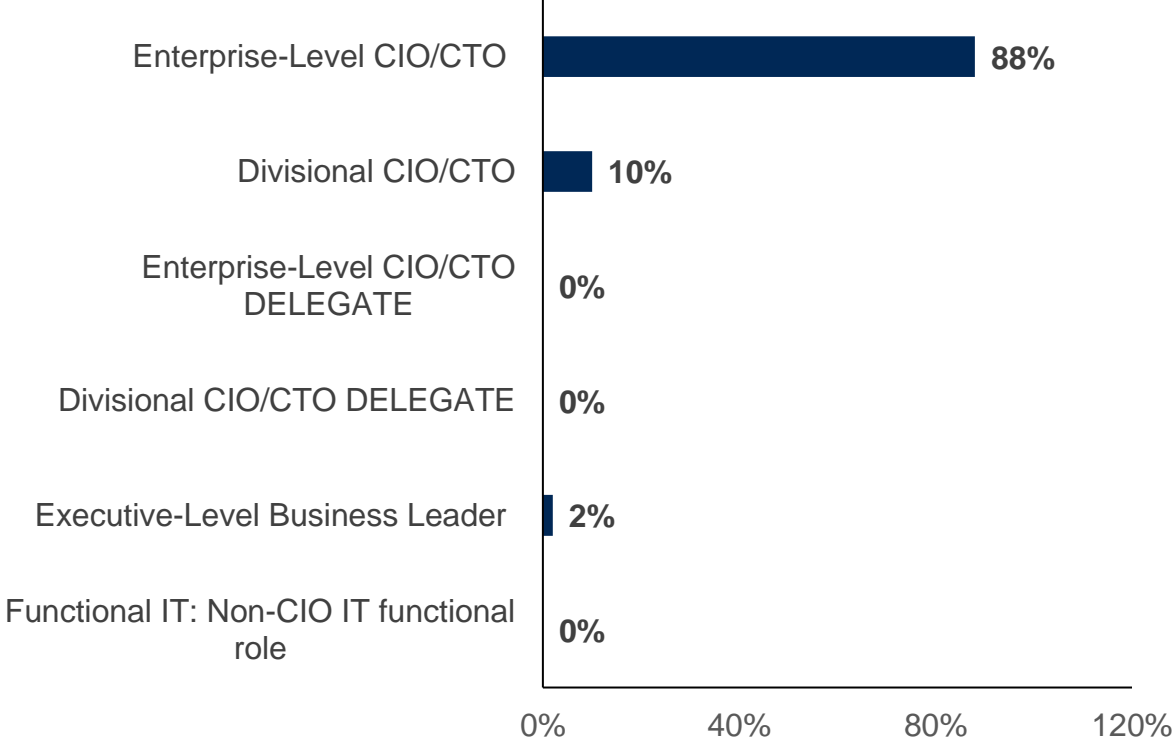
CIO Gender

Percentage of Respondents



Respondents' Role

Percentage of Respondents

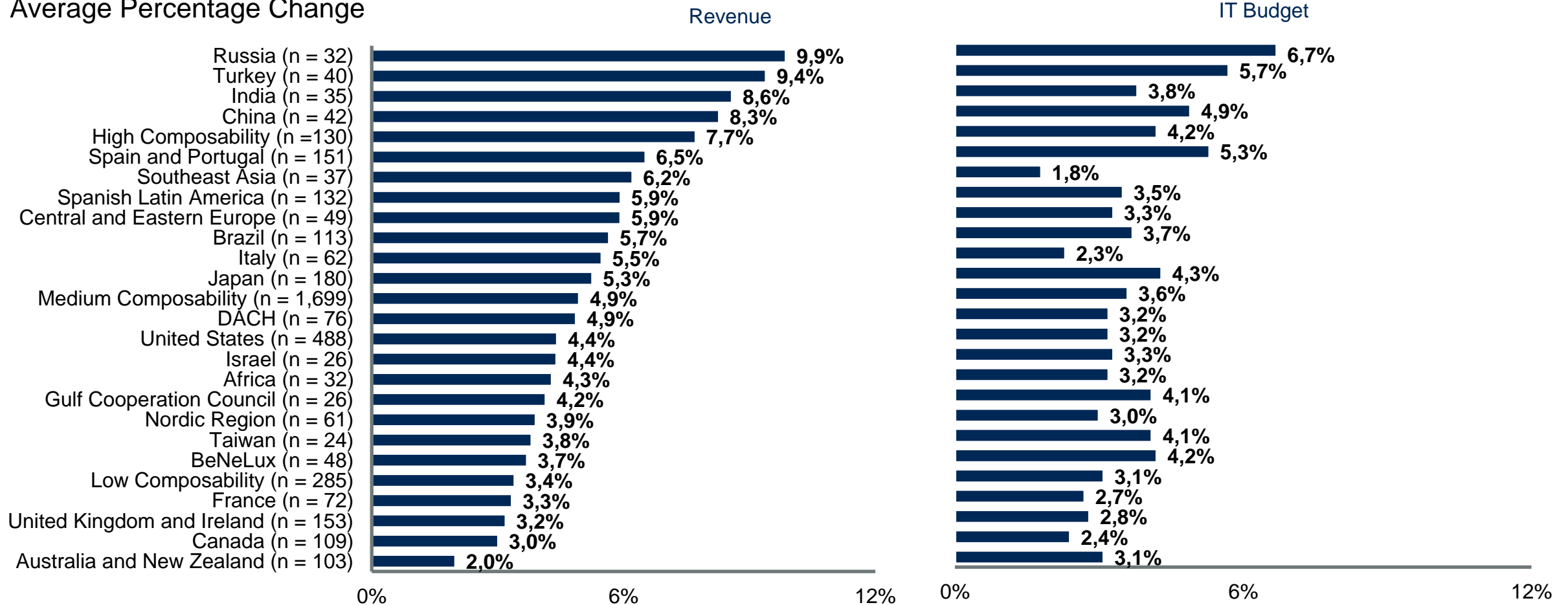


n = 49 Catalan CIOs and technology executives answering
Q. For classification purposes, what is your gender, or the gender of your CIO if answering on their behalf?
Q. Which of the following best describes your role?
Source: 2022 Gartner CIO and Technology Executive Survey

Budget Changes for 2022 Will Vary Widely by Location

Expected Change in Revenue and Change in IT Budget From 2021 to 2022

Average Percentage Change



n varies by segment, CIOs and technology executives answering, excluding not sure

Q. By what percentage do you expect your enterprise's revenue/overall budget/turnover to increase or decrease from 2021 to 2022?

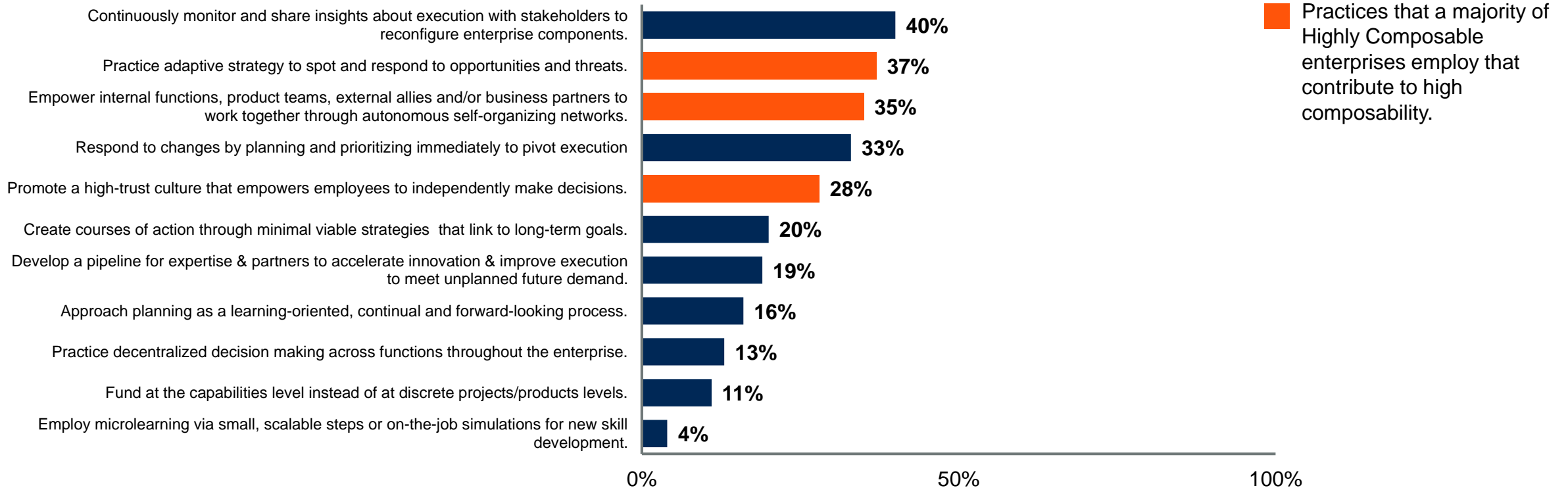
Q. By what percentage do you expect your enterprise's IT budget to increase or decrease from 2021 to 2022?

Source: 2022 Gartner CIO and Technology Executive Survey

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Only a minority of the Catalan respondents employ the practices related to composable thinking

Practices related to composable thinking Percentage of Respondents who Perform It



n = 46 Catalan CIOs and technology executives answering

Q. Which of these practices does your enterprise follow completely and consistently?

Source: 2022 Gartner CIO and Technology Executive Survey

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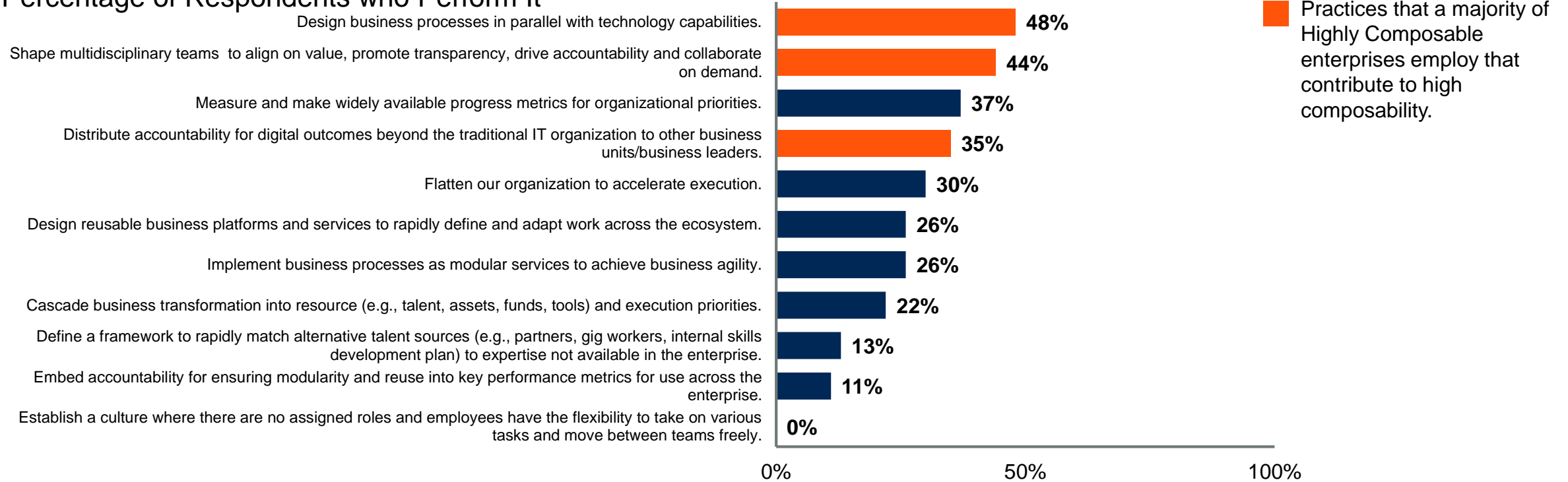
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A minority of the Catalan respondents use the composable business architecture practices

Practices related to composable business architecture

Percentage of Respondents who Perform It



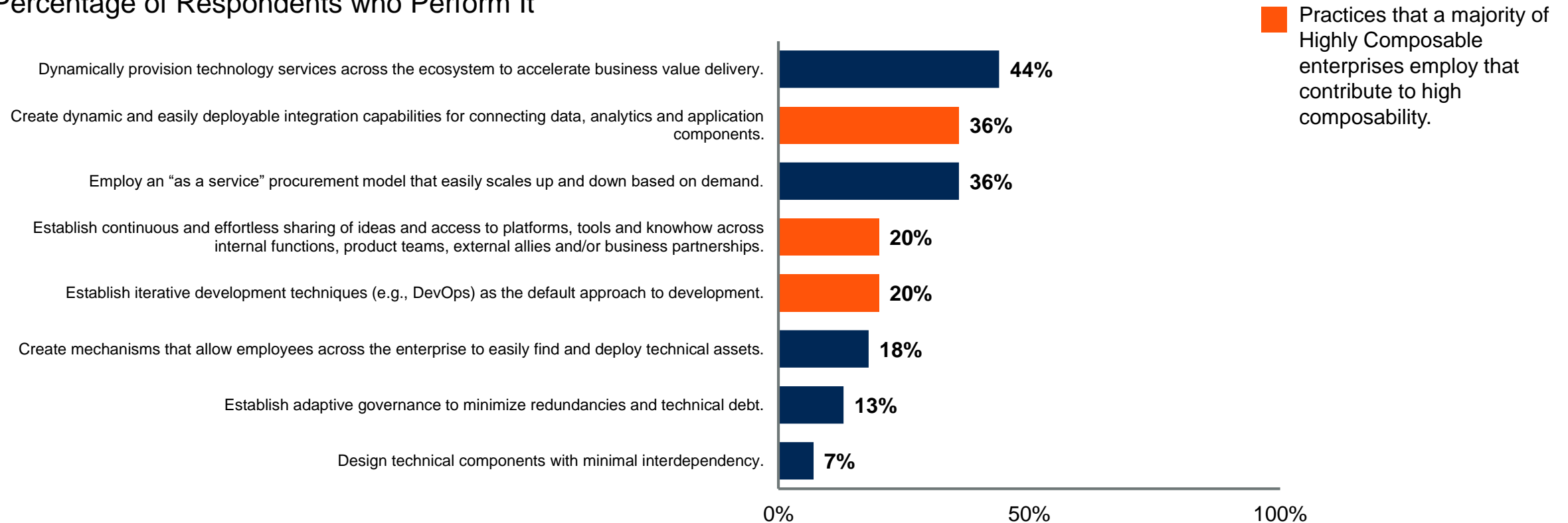
n = 46 Catalan CIOs and technology executives answering

Q. Which of these practices does your enterprise follow completely and consistently?

Source: 2022 Gartner CIO and Technology Executive Survey

A minority of the Catalan respondents employ the practices related to composable technology

Practices related to composable technology Percentage of Respondents who Perform It



n = 46 Catalan CIOs and technology executives answering

Q. Which of these technology-related practices does your enterprise use completely and consistently?

Source: 2022 Gartner CIO and Technology Executive Survey

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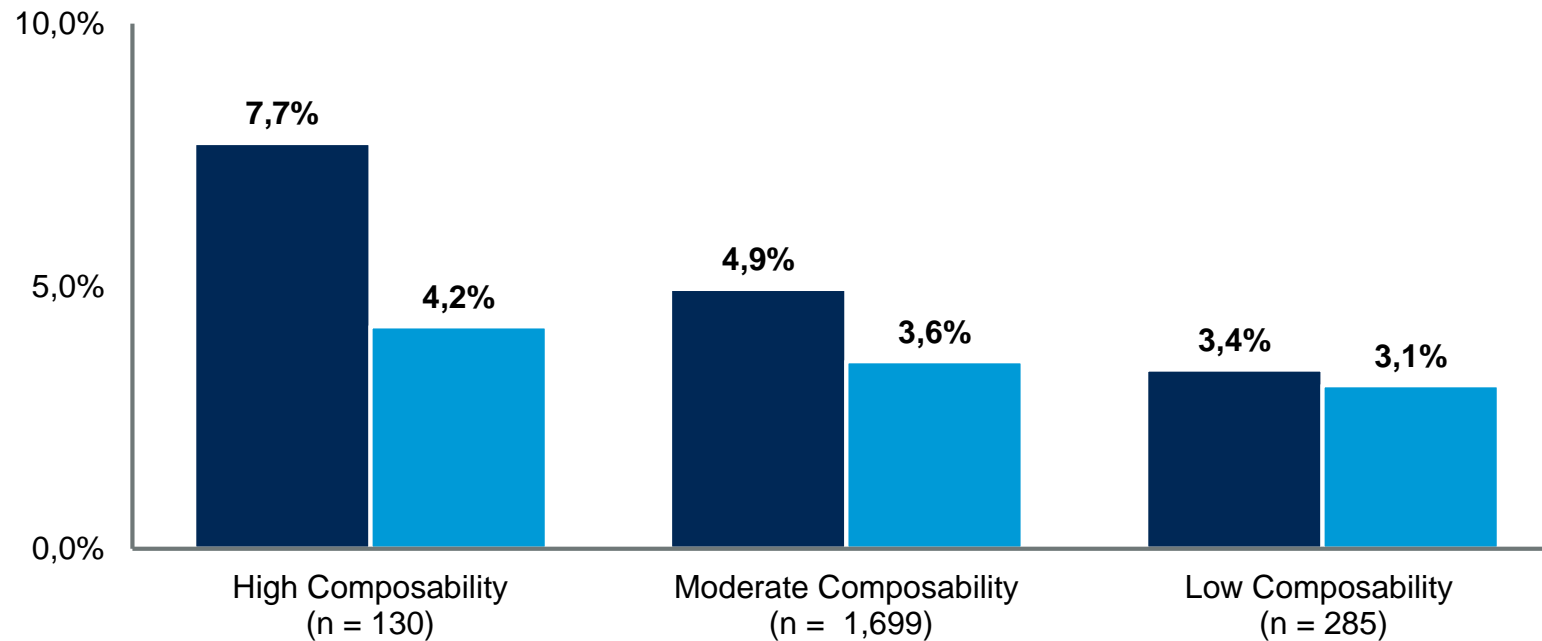
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High-Composability Enterprises Increase Revenue/Budget Faster and Leverage IT Better

Expected Change in Revenue and Change in IT Budget From 2021 to 2022

Average Percentage Change

■ Change in Revenue ■ Change in IT Budget



n varies by segment, CIOs and technology executives answering, excluding not sure

Q. By what percentage do you expect your enterprise's revenue/overall budget/turnover to increase or decrease from 2021 to 2022?

Q. By what percentage do you expect your enterprise's IT budget to increase or decrease from 2021 to 2022?

Source: 2022 Gartner CIO and Technology Executive Survey

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