CIO Agenda Results of CIO Survey – CACIO

Hynek Bury, Vaclav Spana Gartner Executive partners

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The Most Comprehensive Global Study of ClOs +3,100 ClOs

Gartner CIO Agenda — Resource Center

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Gartner CIO and Technology Executive Agenda for 2025

CIO leadership/ management priorities

> Technology investment plans

Technology deployment timelines Latin America

North

America

Global

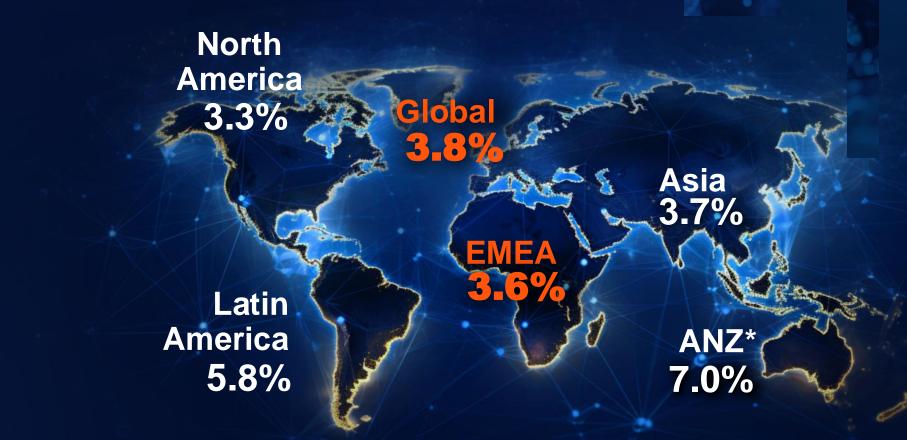
EMEA

Asia

ANZ

*ANZ = Australia and New Zealand

Expected IT Budget Increase in 2025



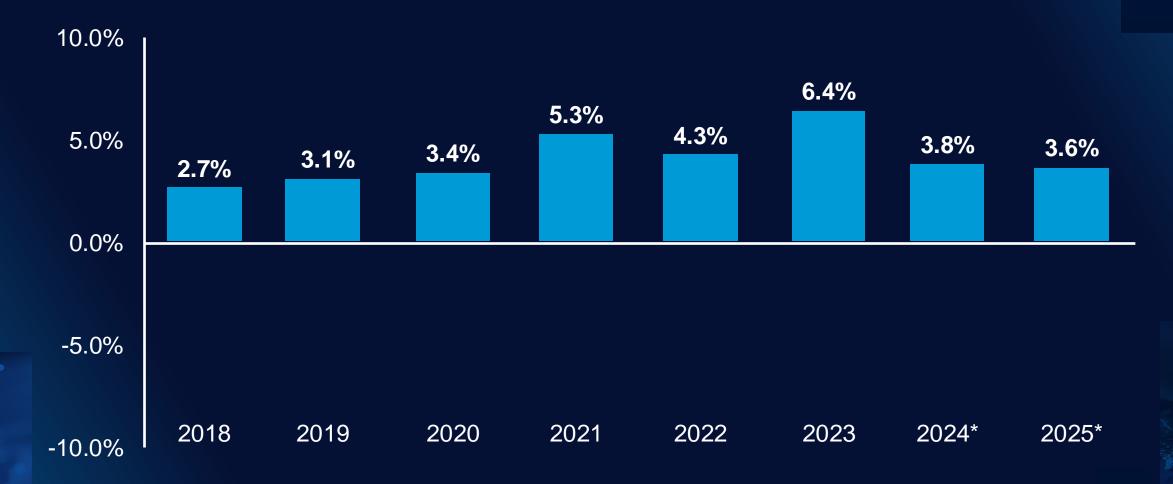
n varies by region, CIOs and technology executives answering; Global (n = 2,906) North America (n = 895), Latin America (n = 258), EMEA (n = 1,253), Asia (n = 399), ANZ (n = 101) Source: 2025 Gartner CIO and Technology Executive Survey 'ANZ = Australia and New Zealand

Inflation In Europe Has Eaten Up Most of the Increases



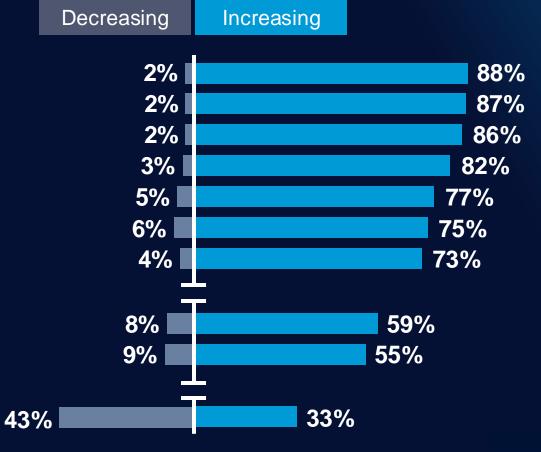
Source: World Economic Outlook (IMF); Gartner IT Key Metrics Data; 2025 Gartner CIO and Technology Executive Survey * 2024 and 2025 figures are projected

Nominal Growth in IT Budgets (EMEA)



Source: Gartner IT Key Metrics Data; 2025 Gartner CIO and Technology Executive Survey * 2024 and 2025 figures are projected

Strong Investment Growth in Digital Foundations in EMEA



Cyber/information security Generative Al Artificial intelligence Business intelligence and data analytics Cloud platforms Application modernization Integration technologies/APIs/API architecture

> Hyperautomation Low-code/no-code platforms

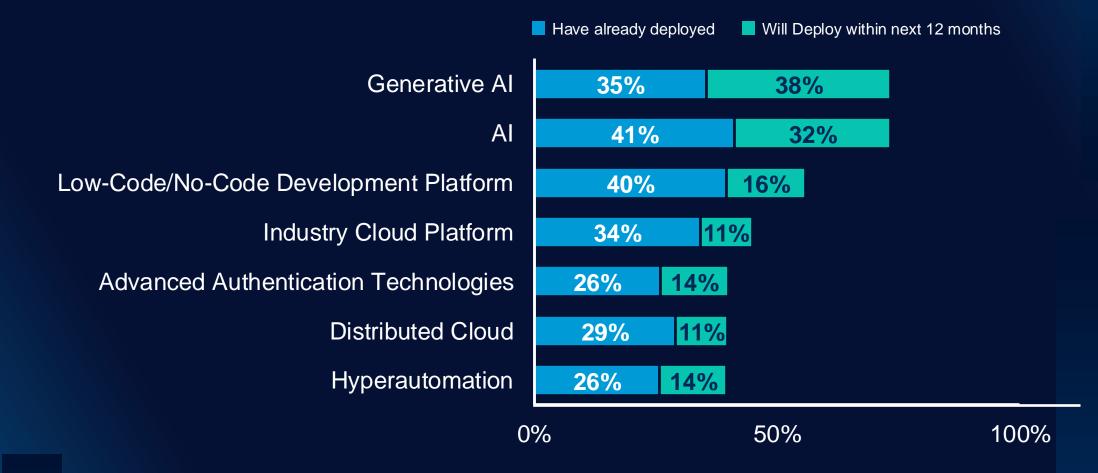
Legacy infrastructure and data center technologies

n =1,275 to 1,332 CIOs and technology executives whose enterprises have deployed the technology from EMEA

Source: 2025 Gartner CIO and Technology Executive Survey Note: Chart omits percentage of respondents to select "no change in funding"

Top 7 Emerging Technologies

Already deployed or to be deployed within 12 months in EMEA



n = 1,359 CIOs and technology executives from EMEA answering

Q: What are your enterprise's plans in terms of the following digital technologies and trends? Source: 2025 Gartner CIO and Technology Executive Survey

Cacio CIO Survey



Respondent Profile: Industry and Enterprise Type

Percentage of Czech CIO Association Respondents Government — National or... 18% Education — Other — Vocational. 12% Energy — Oil and Gas, Coal and... 9% Education Provider — Higher.. **6%** Government — County, Region or .. **6%** Information Technology — IT... 6% Information Technology — IT... Information Technology — IT Software 6% Media — Advertising, Social Media. **6%** Banking — Others (e.g., credit.) 3% Construction (e.g., buildings, ... 3% Government — Local, Municipal or.. 3% Manufacturing — Aerospace and **3%** Manufacturing — Chemicals and ... Manufacturing — Industrial ... 3% Transportation — Motor Freight, Air. 3% Transportation — Rail and Water **3%** Utilities — Integrated Electric and/or ... 3% 0% 50% 100%

n = 34 Czech CIO Association CIOs and technology executives answering

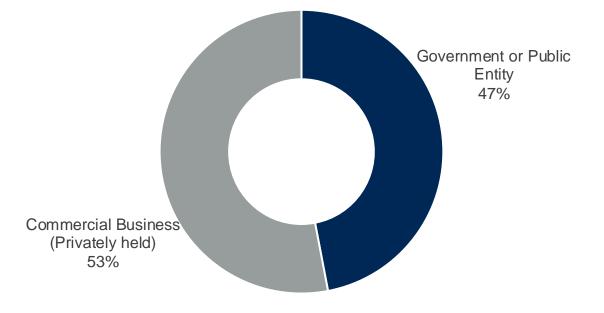
Q. Primary industry classification Source: 2025 Gartner CIO and Technology Executive Survey

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Industry Roll-up

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Enterprise Classification



n = 34 Czech CIO Association CIOs and technology executives answering

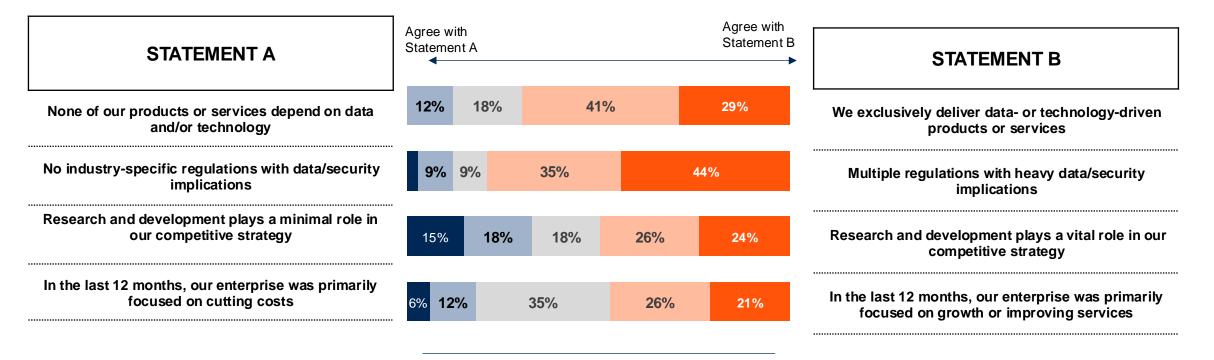
Q. Which of these descriptions best fits your enterprise? Source: 2025 Gartner CIO and Technology Executive Survey



Respondents tend to be from companies with a heavy regulatory burden

Enterprise characteristics

Percentage of Czech CIO Association Respondents



n = 34 Czech CIO Association CIOs and technology executives answering

Q. For each of the following opposing characteristics, please select the point on the continuum that best reflects the enterprise that you work for. Source: 2025 Gartner CIO and Technology Executive Survey

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Job of the CIO

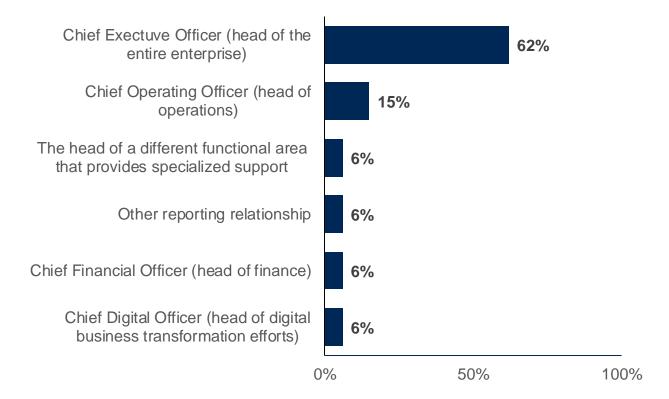


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CIOs tend to report to CEOs, though 38% do not.

CIO reporting lines

Percentage of Czech CIO Association Respondents



n = 34 Czech CIO Association CIOs and technology executives answering

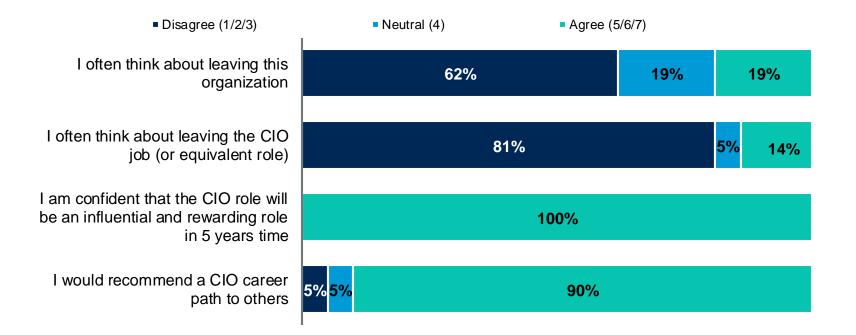
Q. To whom do you report?-To whom does your CIO report? Source: 2025 Gartner CIO and Technology Executive Survey



Cacio CIO Happiness: Most CIOs are satisfied with their job

Agreement with Statements

Scale of 1 (Strongly Disagree) to 7 (Strongly Agree)



n = 21 Czech CIO Association CIOs and technology executives answering

Q. We would like to know how much you agree or disagree with each statement in terms of how well it describes you. Source: 2025 Gartner CIO and Technology Executive Survey

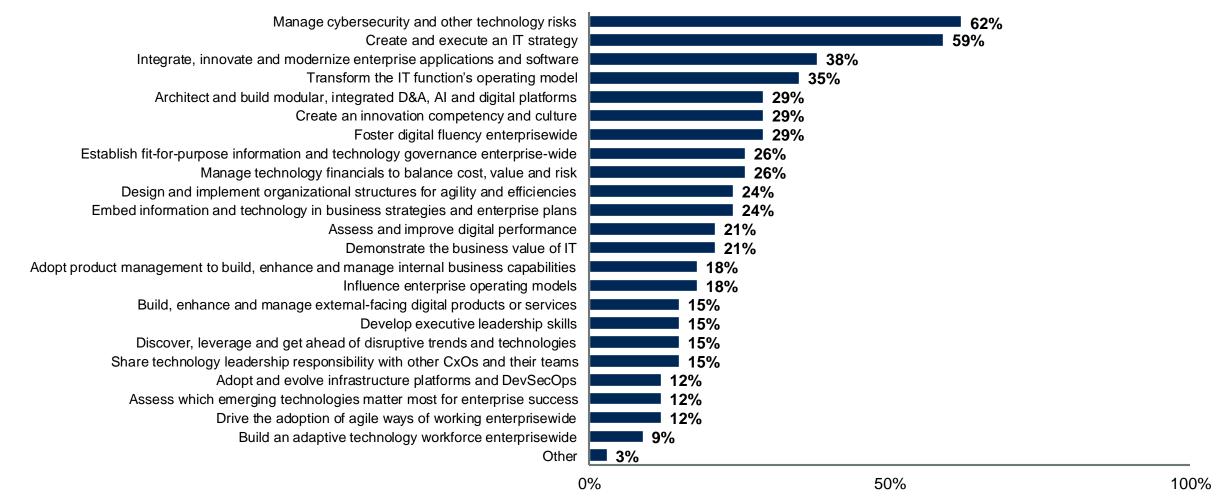


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CIO Focus Areas for 2025 (from the Gartner Priorities Navigator for CIOs)

Percentage of Czech CIO Association Respondents



n = 34 Czech CIO Association CIOs and Technology Executives answering

Q. On which of the following management activities will you focus most of your personal working time and attention in the next 12 months? Source: 2025 Gartner CIO and Technology Executive Survey

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Importance of Supporting Business Areas' Digital Execution



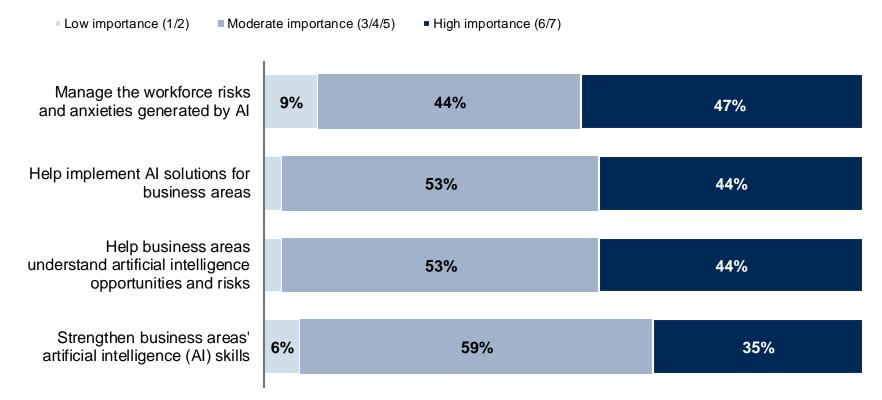
IT's Role in Al Enablement for Business Areas

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Importance of IT Function to Perform These Tasks

Scale of 1 (Not at all important) to 7 (Extremely Important)



n = 34 Czech CIO Association CIOs and technology executives answering

Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies? Source: 2025 Gartner CIO and Technology Executive Survey

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Cacio IT's Role in Developing Business Technologists Within Business Areas

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Importance of IT Function to Perform These Tasks

Scale of 1 (Not at all important) to 7 (Extremely Important)

Low importance (1/2)Moder	ate importance (3/4/5)	• ł	High importance (6/7)		
Improve business areas' skills for building or implementing digital technologies			59%	41%	
Help business areas source and hire their	own technology talent	21%	44%	35%	
Improve business areas' ability t	o lead digital initiatives		65%	32%	
Build learning networks or connections for b build, implement or mana			71%	26%	
Help business areas identify their own techn	ology skill requirments	12%	62%	26%	
Adapt IT processes and ways of working to	enable business areas to work in Agile ways		74%	24%	
Help business areas' staff adopt Agile o	levelopment practices	15%	68%	18%	

n = 34 Czech CIO Association CIOs and technology executives answering

Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies? Source: 2025 Gartner CIO and Technology Executive Survey

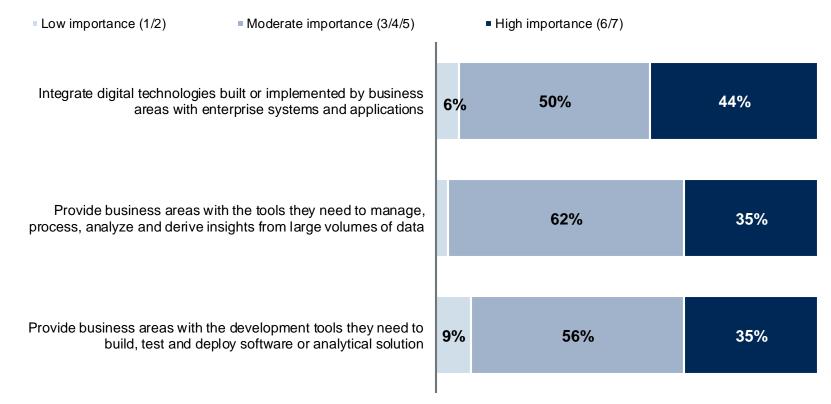
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Cacio IT's Role in Enterprise Platform Engineering for Business Areas

Importance of IT Function to Perform These Tasks

Scale of 1 (Not at all important) to 7 (Extremely Important)



n = 34 Czech CIO Association CIOs and technology executives answering

Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies? Source: 2025 Gartner CIO and Technology Executive Survey

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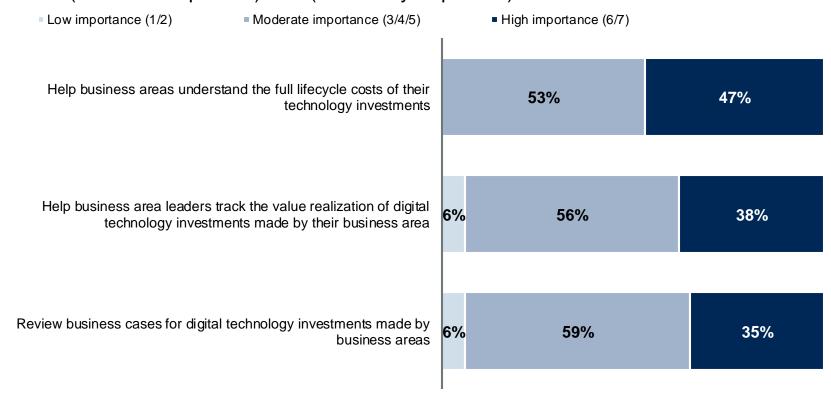
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IT's Role in Providing Technology Finance Advice to Business Areas

Importance of IT Function to Perform These Tasks

Scale of 1 (Not at all important) to 7 (Extremely Important)



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Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies? Source: 2025 Gartner CIO and Technology Executive Survey

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Cacio IT's Role in Providing Vendor Management Advice to Business Areas

Importance of IT Function to Perform These Tasks

Scale of 1 (Not at all important) to 7 (Extremely Important)

Low importance (1/2) Moderate importance (3/4/5) High importance	ance (6/7)	
Provide tools or advice to help business areas select and manage technology vendors	59%	38%
Review contracts and terms for digital technologies or services purchased by business areas	62%	35%
Help business areas evaluate technology vendors or service providers	6% 62%	32%
Help business areas negotiate competitive pricing and service agreements with technology vendors or service providers	68%	29%

n = 34 Czech CIO Association CIOs and technology executives answering

Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies? Source: 2025 Gartner CIO and Technology Executive Survey

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IT's Role in Providing EA/Risk Management Advice to Cacio **Business Areas**

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Importance of IT Function to Perform Certain Tasks Scale of 1 (Not at all important) to 7 (Extremely Important)

Low importance (1/2) Moderate importance (3/4/5) High importance (6/7)					
Provide cybersecurity advice to help business areas build, implement or manage digital technologies securely		38%	59%		
Provide enterprise architecture advice to help business areas build, implement or manage digital technologies that are technically sound and efficient		47%	50%		
Provide legal advice to help business areas' digital technologies comply with applicable laws, regulations and standards	6%	47%	47%		

n = 34 Czech CIO Association CIOs and technology executives answering

Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies? Source: 2025 Gartner CIO and Technology Executive Survey

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2025 CIO Agenda: Grow the Digital Vanguard Make It Easier to Lead and Build Digital Together With IT



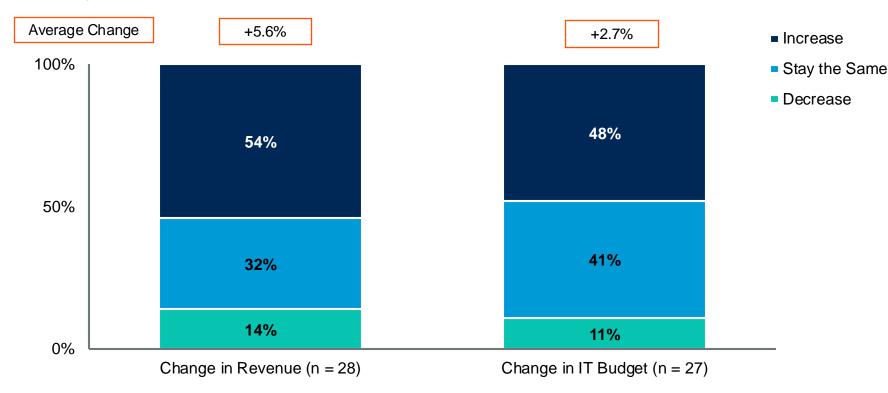
Technology Plans



A Majority of Respondents Expect Revenue and IT Budget to Increase

Expected Change in Revenue and IT Budget in 2025

Percentage of Czech CIO Association Respondents



n varies by question, Czech CIO Association CIOs and technology executives answering, excluding "don't know"

Q. By what percentage do you expect your enterprise's revenue to increase or decrease from 2024 to 2025?

Q. By what percentage do you expect your enterprise's IT budget to increase or decrease from 2024 to 2025?

Source: 2025 Gartner CIO and Technology Executive Survey

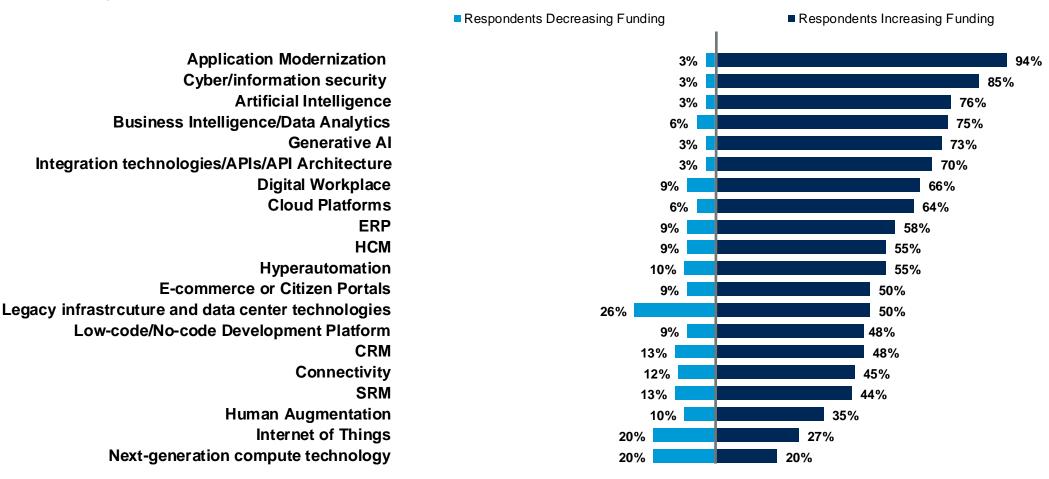
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Changes in Technology Funding, from 2024 to 2025

Percentage of Czech CIO Association Respondents



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Q. For each of these technology areas, will your enterprise increase or decrease funding in 2025 compared with 2024? Source: 2025 Gartner CIO and Technology Executive Survey Note: Chart omits percentage of respondents to select "No Change in Funding"

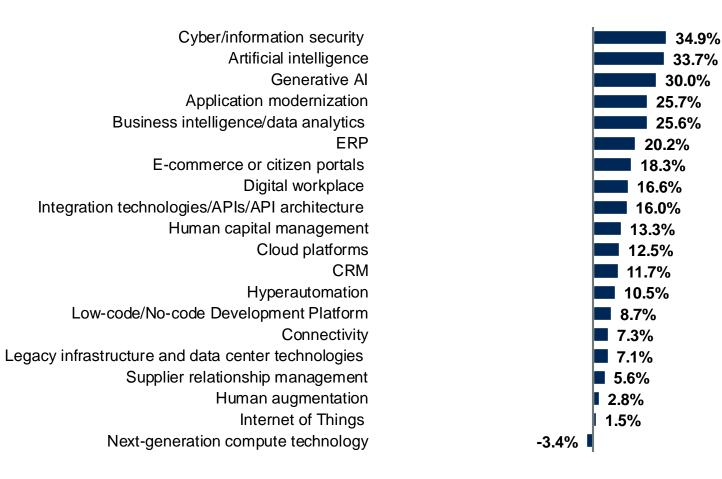
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Changes in Technology Funding Average Percentage Change (Mean) in Funding in 2025



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Q. For each of these technology areas, by how much will your enterprise increase or decrease funding in 2025 compared with 2024? Source: 2025 Gartner CIO and Technology Executive Survey

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State of Deployment for Emerging Technologies

Percentage of Czech CIO Association Respondents

Not Sure No interest Will deploy in 2-3 years Will deploy in 2-3 years	eploy between 12	to 24 months	Will deploy with	in next 12 m	nonths • Hav	e already de	ployed	
5G	12%	29%	69	6	1 <mark>8%</mark> 6	%	29%	
Distributed Cloud	9%	26%	12%	12%	18	%	24	%
AI	18	8%	24%		32%		2	.1%
Advanced Authentication Technologies	6% 18	%	24%		21%	12%	2	.1%
Low-Code/No-Code Development Platform	9%	35%		9%	15%	18%		15%
Industry Cloud Platform	15%	24%		21%	15%	1 2	2%	15%
Multiexperience development platform (MXDP)	12%	24%	18	%	21%	12	2%	15%
Edge Computing	15%		38%		12%	15%	9%	12%
Hyperautomation	9%	26%		32%		12%	9%	12%
Secure Access Service Edge (SASE)	21%		29%		15%	18%	6%	12%
Blockchain	15%		56%			6%	9%	12%
Privacy-Enhancing Computation	12%	26%		18%	12%	24	4%	9%
Immersive Technologies	24%		32%		12%	9%	15%	9%
Generative Al	6%	21%	21%			44%		6%
Superapps	15%		44%		18	%	15%	6%
Synthetic data	21%		35%		21%		12%	9%
Quantum Computing	12%		65	%			12%	6% 6%
0	%			50%				100%

n = 34 Czech CIO Association CIOs and technology executives answering

Q. What are your enterprise's plans in terms of the following digital technologies and trends? Source: 2025 Gartner CIO and Technology Executive Survey *Not showing data labels for values less than 3%

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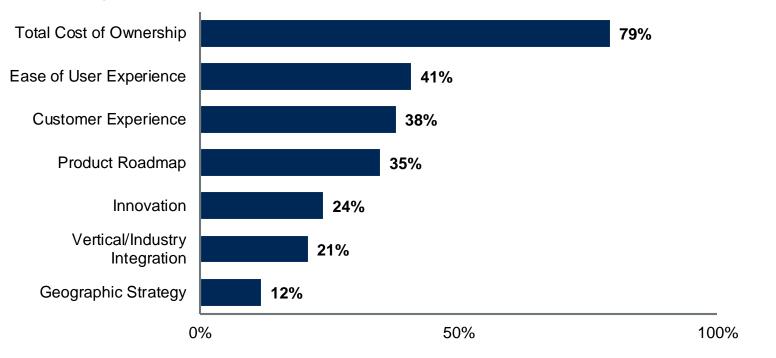
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Most CIOs Select Providers For Commodity Technologies Based On Total Cost Of Ownership And Ease Of User Experience

Characteristics that CIOs Seek in Technology Providers of Non-differential technologies

Percentage of Czech CIO Association Respondents



n = 34 Czech CIO Association CIOs and technology executives answering

Q. When selecting global vendors/providers for Commodity/Non-Differential Technologies, what are the three most important characteristics you seek? Source: 2025 Gartner CIO and Technology Executive Survey

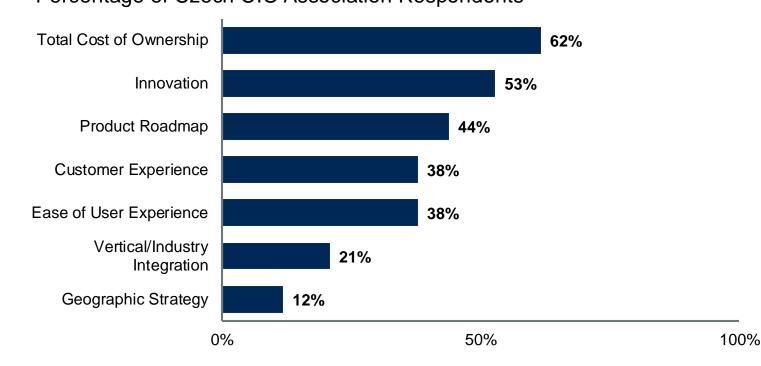
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Innovation and Total Cost of Ownership Are Viewed as Important by most CIOs When Selecting Providers for Differential Technologies

Characteristics that CIOs Seek in Technology Providers of Competitive Advantage Technologies Percentage of Czech CIO Association Respondents



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Q. When selecting global vendors/providers for Competitive Advantage/Differential Technologies what are the three most important characteristics you seek? Source: 2025 Gartner CIO and Technology Executive Survey

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Outcomes from Digital Technology Investments





Outcomes from Digital Technology Investments

To understand which outcomes enterprises pursued with digital technology investments, we showed respondents a granular list of 27 options, from which they could choose nine. These 27 options are grouped into 7 overarching categories on the following slides:

Improve Operating Margins	Increase throughput — speed, capacity, agility; Reduce production cost per unit; Reduce purchase cost per unit; Improve quality of our products or services; Improve reliability and resilience of operations
Ensure Compliance/Minimize Risks	Enterprise risk management; Comply with laws and regulations; Analyze or manage risks; Adopt industry standards; Environmental, social, governance (ESG) or sustainability
Excel in Customer (or Citizen) Experience	Improve the customer/citizen experience; Improve quality of our service channels; Increase customer/citizen engagement
Increase Human Capital Effectiveness	Improve the employee experience from hire to retie; Improve the digital workplace (e.g., collaboration, hybrid work); Increase diversity, equity, and inclusion (DEI)
Generate Revenue	Acquire new customers; Retain existing customers; Grow revenue from existing customers (e.g., cross-sales, upsales); Develop, market or launch new products or services
Optimize Asset Utilization	Optimize cash flow; Increase inventory turnover; Increase utilization or lower costs of physical property, plant and equipment (PP&E); Improve reliability and resilience of physical property, plant and equipment (PP&E); Improve the quality of service to internal functions
M&A and Strategic Planning	Strategic planning; Mergers, acquisitions, divestitures, partnerships



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Most Critical Outcomes from Digital Technology Investments Multiple Responses Allowed

		Strategic planning	59%
Category		Improve the quality of service to internal functions	56%
Key		Improve the customer/citizen experience	53%
	Excel in	Improve the digital workplace	50%
82%	Customer (or Citizen)	Develop, market, or launch new products or services	50%
Experience	Comply with laws and regulations	41%	
	Increase	Analyze or manage risks	38%
700/	Human	Improve reliability and resilience of operations	38%
79%	Capital	Improve quality of our products or services	38%
Effectiveness	Enterprise risk management	35%	
0=0/	Improve	Improve quality of our service channels	35%
85%	Operating Margins	Aquire new customers	32%
	-	Improve the employee experience from hire to retire	29%
Generate Revenue	Grow revenue from existing customers	26%	
	Retain existing customers	26%	
	Ontinuina	Adopt industry standards	18%
85%	Optimize Asset	Mergers, acquisitions, divestitures, partnerships	18%
00 /0	Utilization	Increase throughput - speed, capacity, agility	18%
	M&A	Increase utilization or lower costs of PP&E	18%
68%	Strategic	Increase inventory turnover	15%
00 % Planning	Reduce production cost per unit	12%	
		Optimize cash flow	12%
	Ensure	Increase diversity, equity, and inclusion	9%
94%	Compliance/ Minimize	Increase customer/citizen engagement	9%
	Risks	ESG or sustainability	6%
		Improve reliability and resilience of PP&E	6%
		Reduce purchase cost per unit	3%
			070

n = 34 Czech CIO Association CIOs and technology executives answering

100%

50%

0% Q. Thinking about your enterprise's investments in digital technologies, which types of outcomes are most critical to your enterprise? Source: 2025 Gartner CIO and Technology Executive Survey

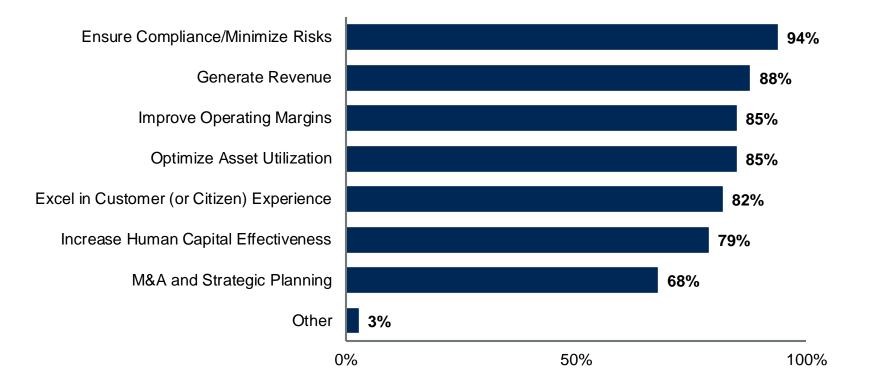
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Most Critical Outcomes from Digital Technology Investments: Summarized Topline Categories Multiple Responses Allowed



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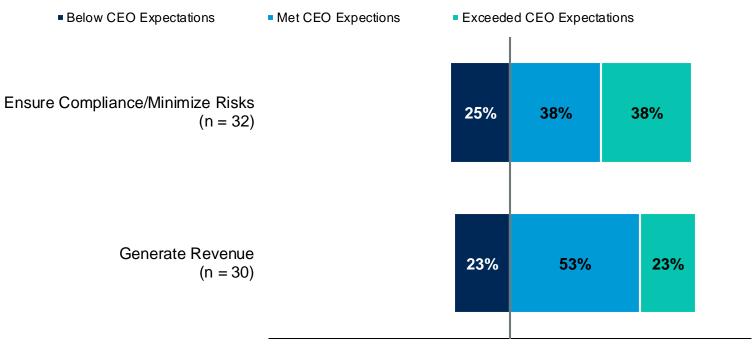
Q. Thinking about your enterprise's investments in digital technologies, which types of outcomes are most critical to your enterprise? Source: 2025 Gartner CIO and Technology Executive Survey

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Cacio Performance of Digital Technology Investments – All Categories



Performance of Digital Technology Investments – Summary by High-Level Outcome Categories

n varies by outcome, Czech CIO Association CIOs and technology executives who selected the given outcome as a critical outcome

Q. How would your CEO (or head of the enterprise, agency, bureau or department) rate the performance of your enterprise's investments in digital technologies toward the realization of these business outcomes?

Source: 2025 Gartner CIO and Technology Executive Survey

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2025 CIO Agenda: Grow the Digital Vanguard Make It Easier to Lead and Build Digital Together With IT











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