

# **CIO Agenda**

## **Results of CIO Survey – CACIO**

Hynek Bury, Vaclav Spana  
Gartner Executive partners

25.12.2024

# The Most Comprehensive Global Study of CIOs

**+3,100 CIOs**

Gartner CIO Agenda — Resource Center

# Gartner CIO and Technology Executive Agenda for 2025

CIO leadership/  
management priorities

Technology  
investment plans

Technology  
deployment timelines



\*ANZ = Australia and New Zealand

# Expected IT Budget Increase in 2025

North America  
3.3%

Global  
3.8%

Asia  
3.7%

EMEA  
3.6%

Latin America  
5.8%

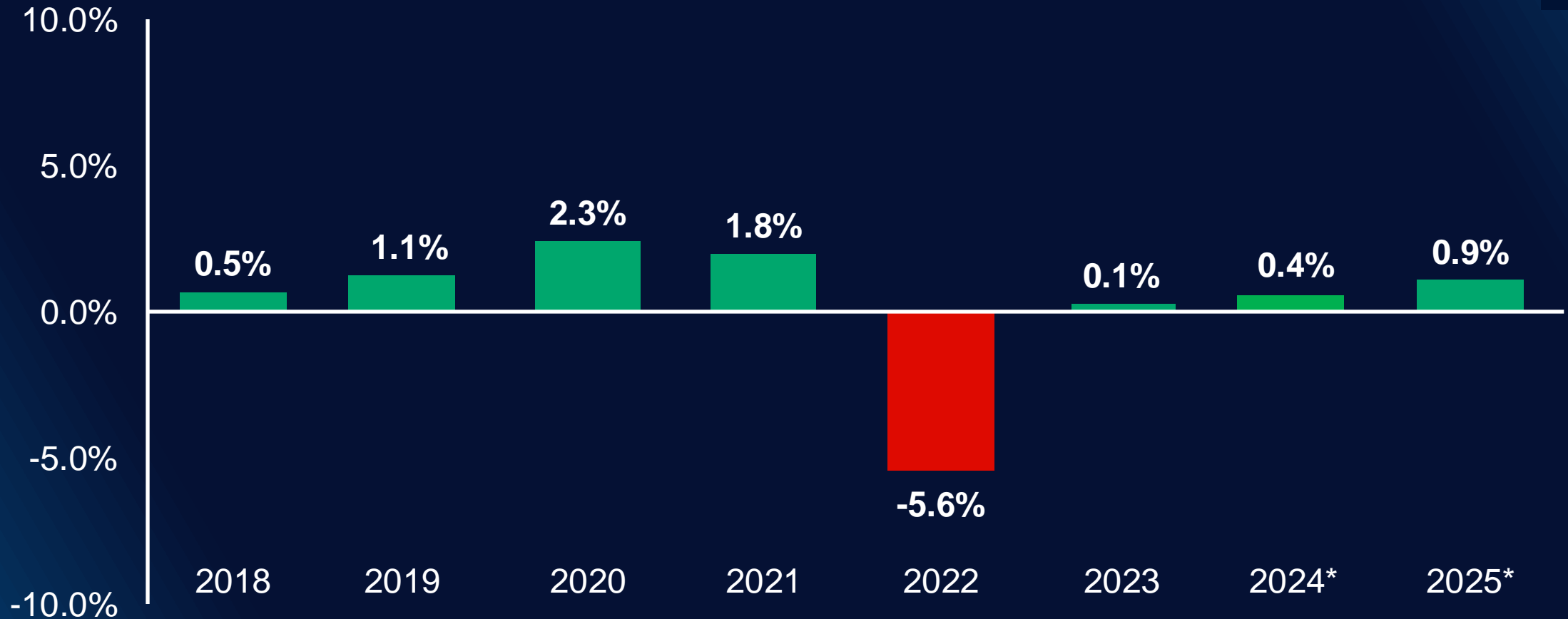
ANZ\*  
7.0%

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

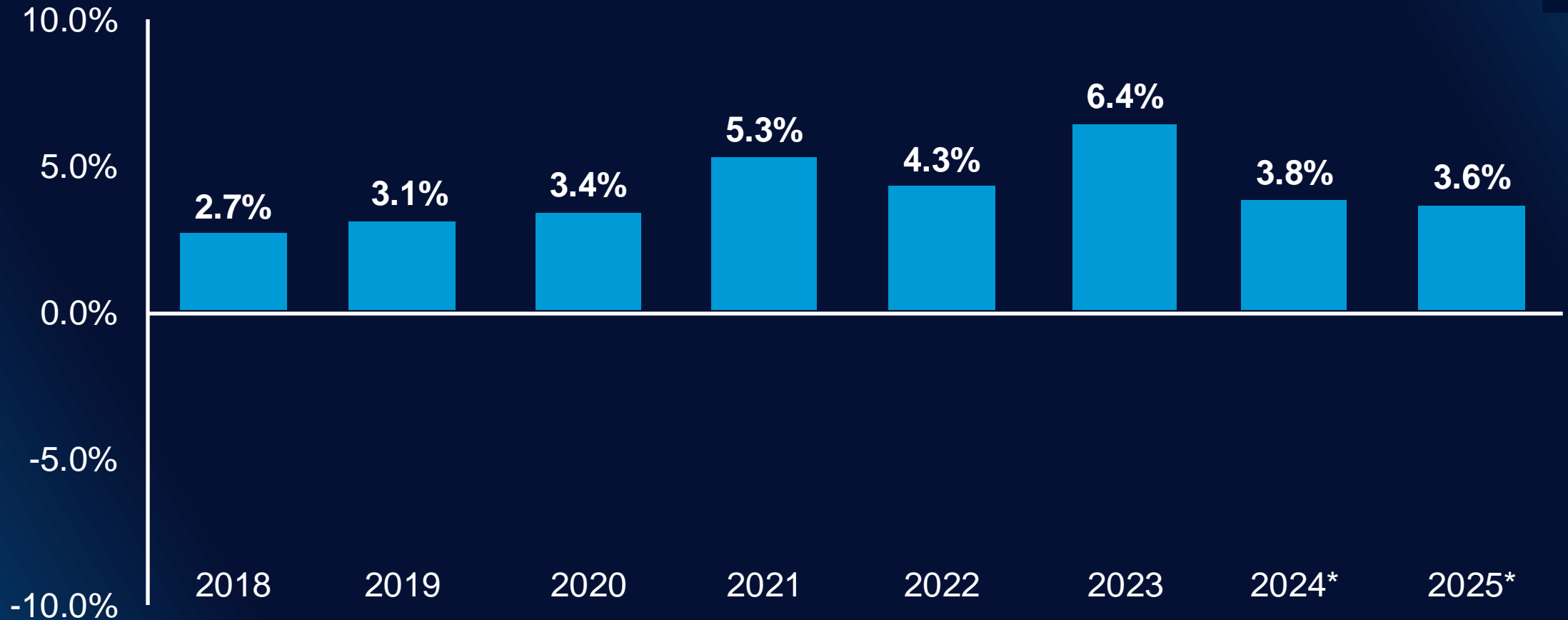
# Inflation In Europe Has Eaten Up Most of the Increases



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

\* 2024 and 2025 figures are projected

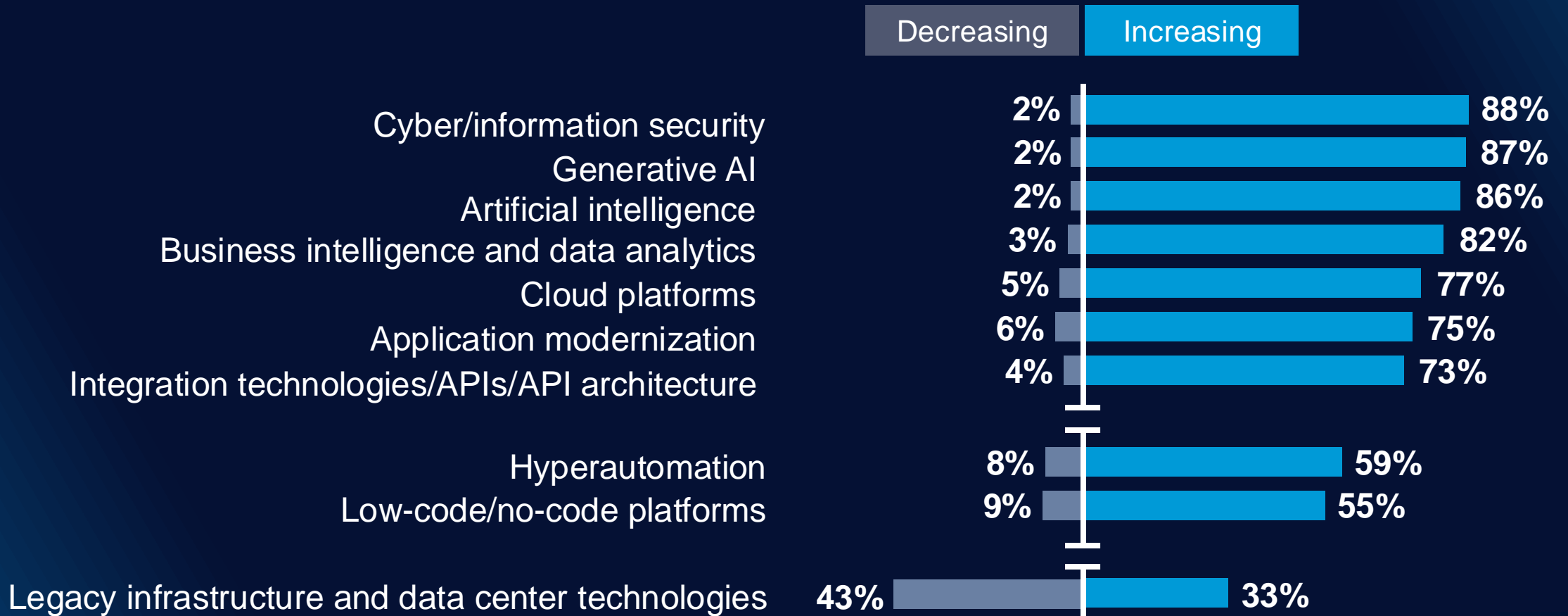
# Nominal Growth in IT Budgets (EMEA)



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



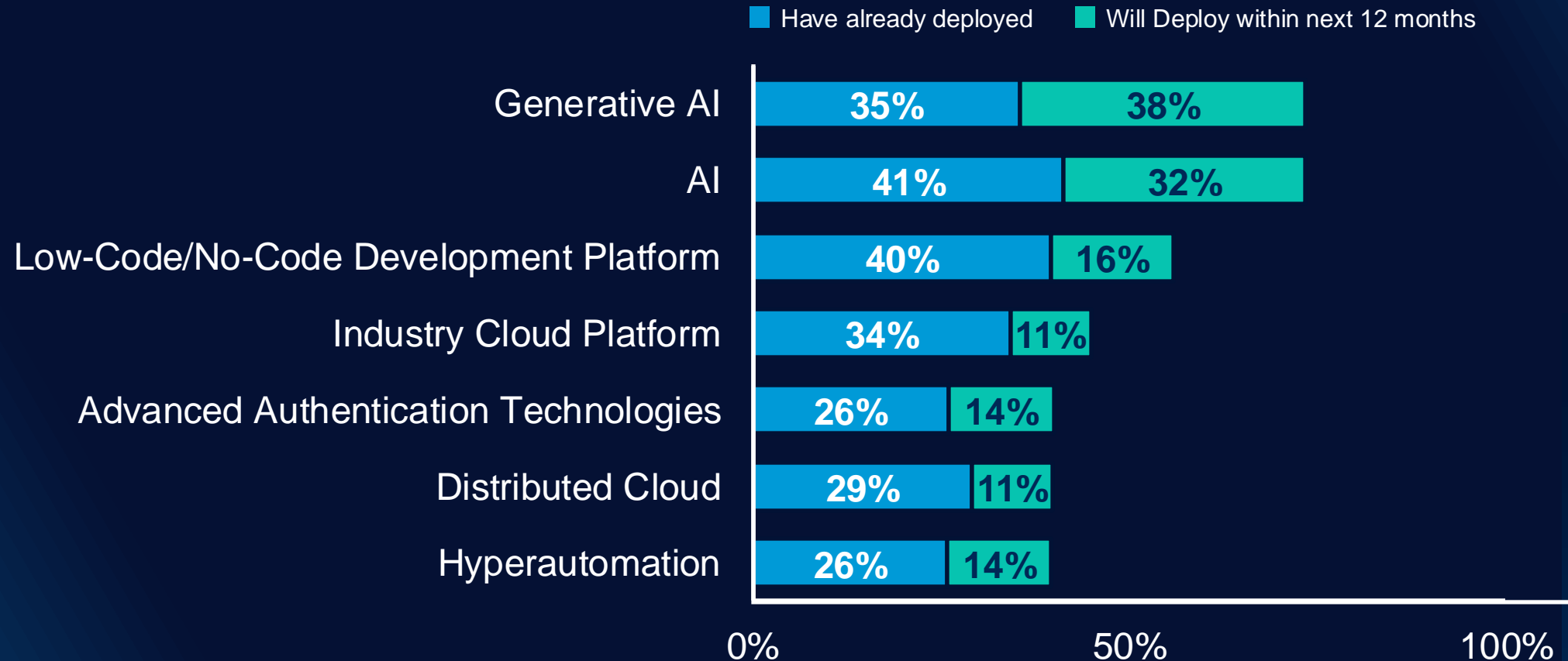
n =1,275 to 1,332 CIOs and technology executives whose enterprises have deployed the technology from EMEA

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

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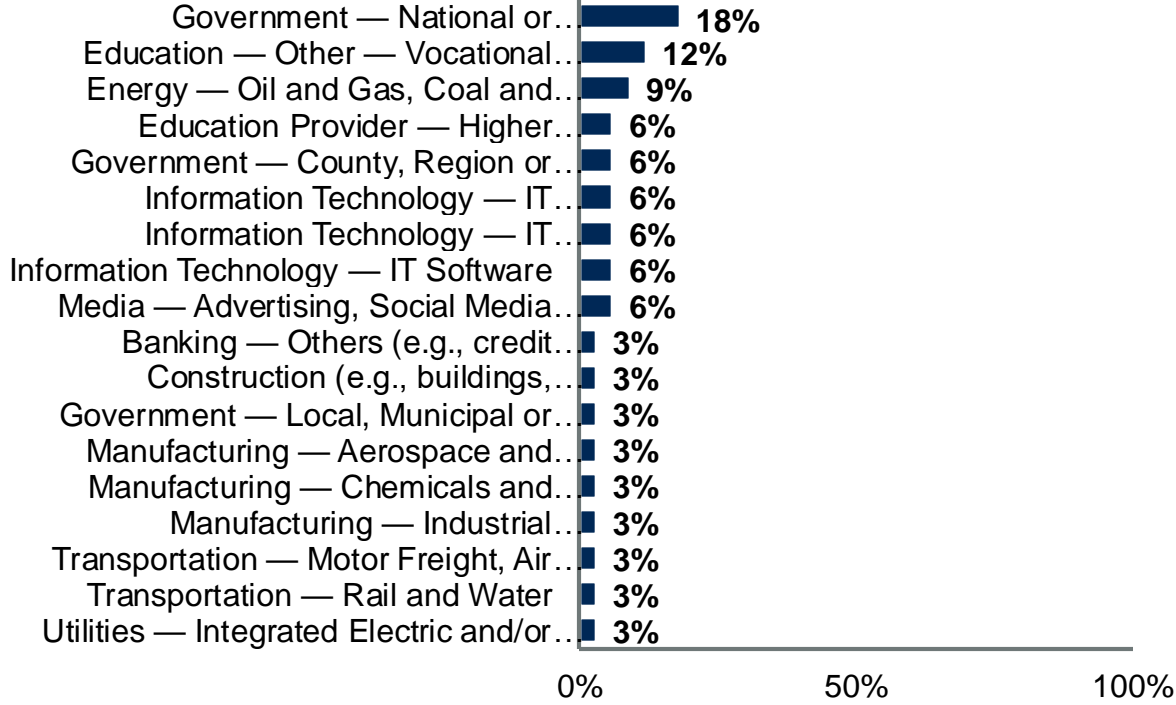
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# Respondent Profile: Industry and Enterprise Type

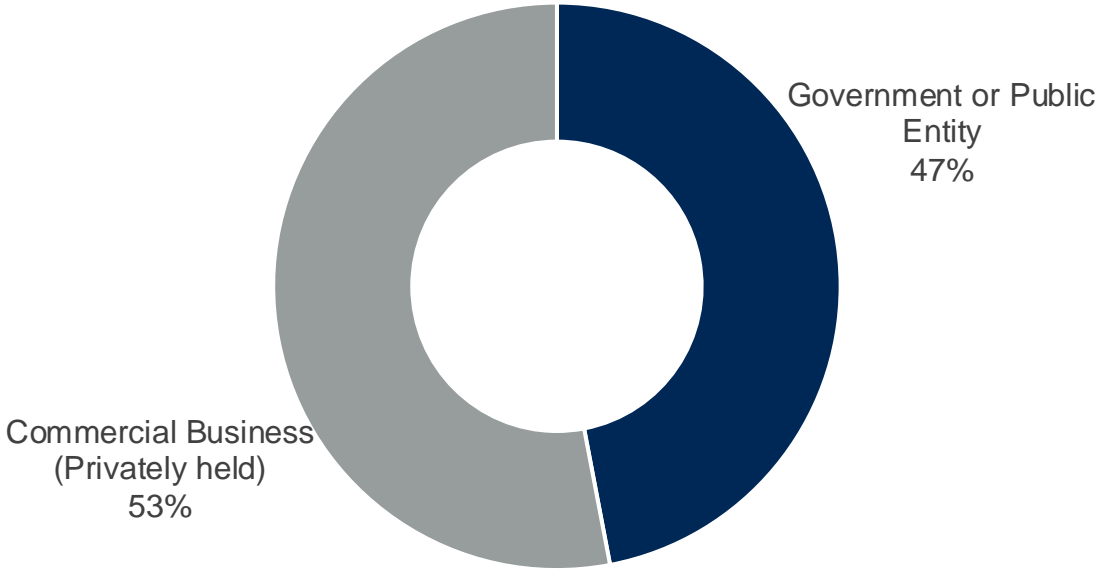
## Industry Roll-up

Percentage of Czech CIO Association Respondents



n = 34 Czech CIO Association CIOs and technology executives answering  
 Q. Primary industry classification  
 Source: 2025 Gartner CIO and Technology Executive Survey

## Enterprise Classification

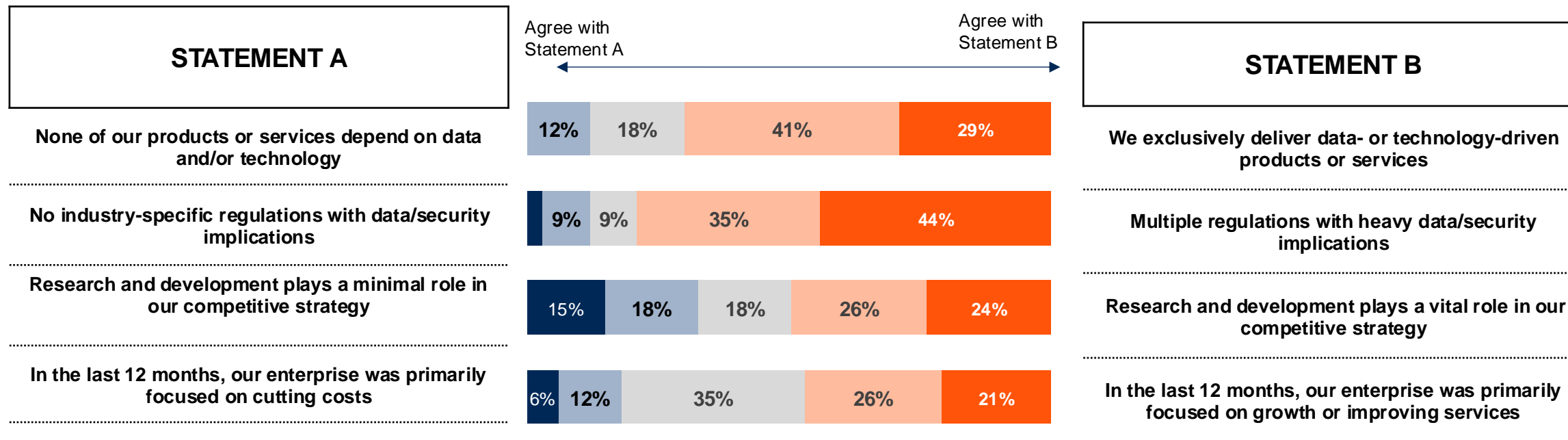


n = 34 Czech CIO Association CIOs and technology executives answering  
 Q. Which of these descriptions best fits your enterprise?  
 Source: 2025 Gartner CIO and Technology Executive Survey

# 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.

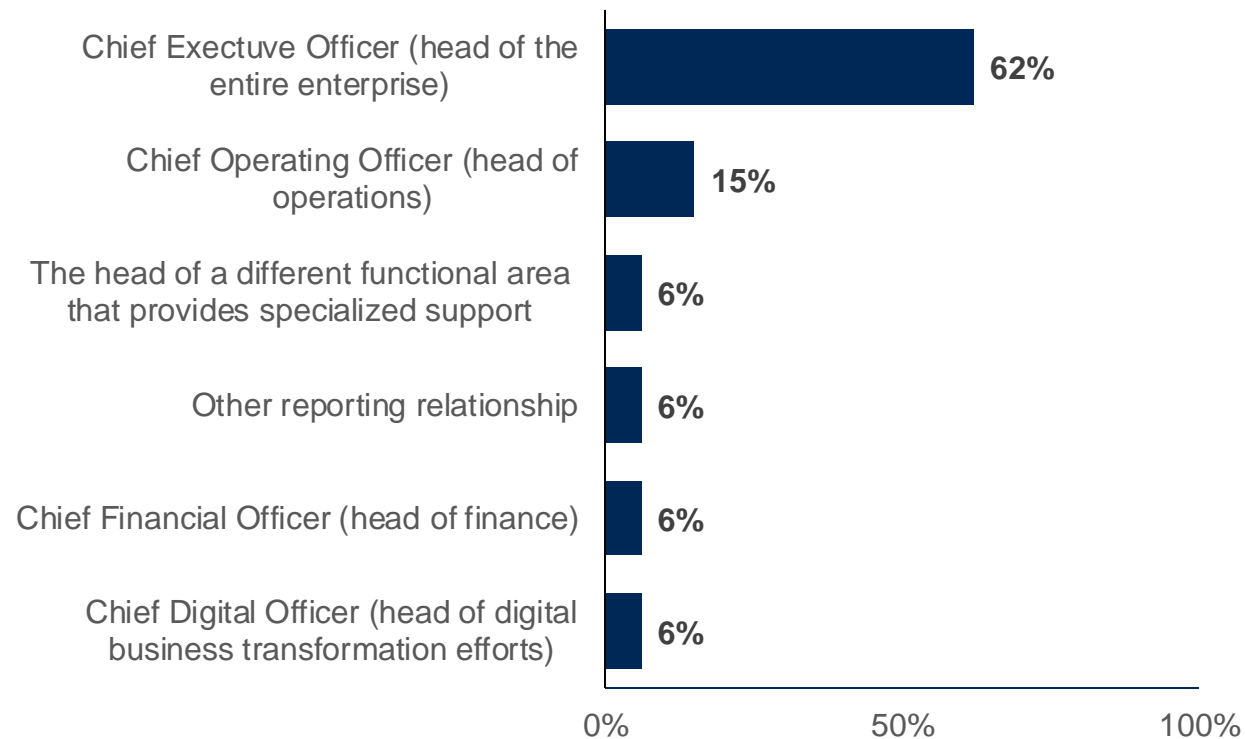
Source: 2025 Gartner CIO and Technology Executive Survey

# Job of the CIO

# 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

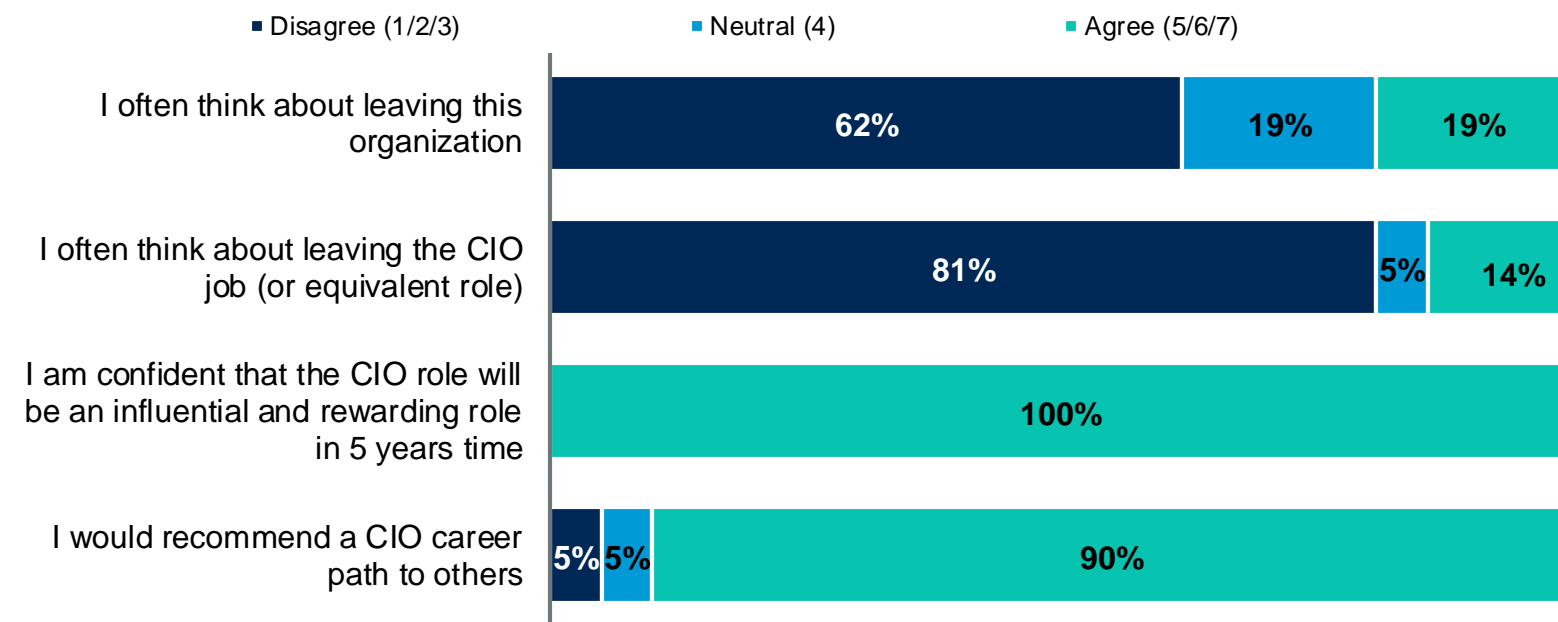
Q. To whom do you report? - To whom does your CIO report?

Source: 2025 Gartner CIO and Technology Executive Survey

# CIO Happiness: Most CIOs are satisfied with their job

## Agreement with Statements

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



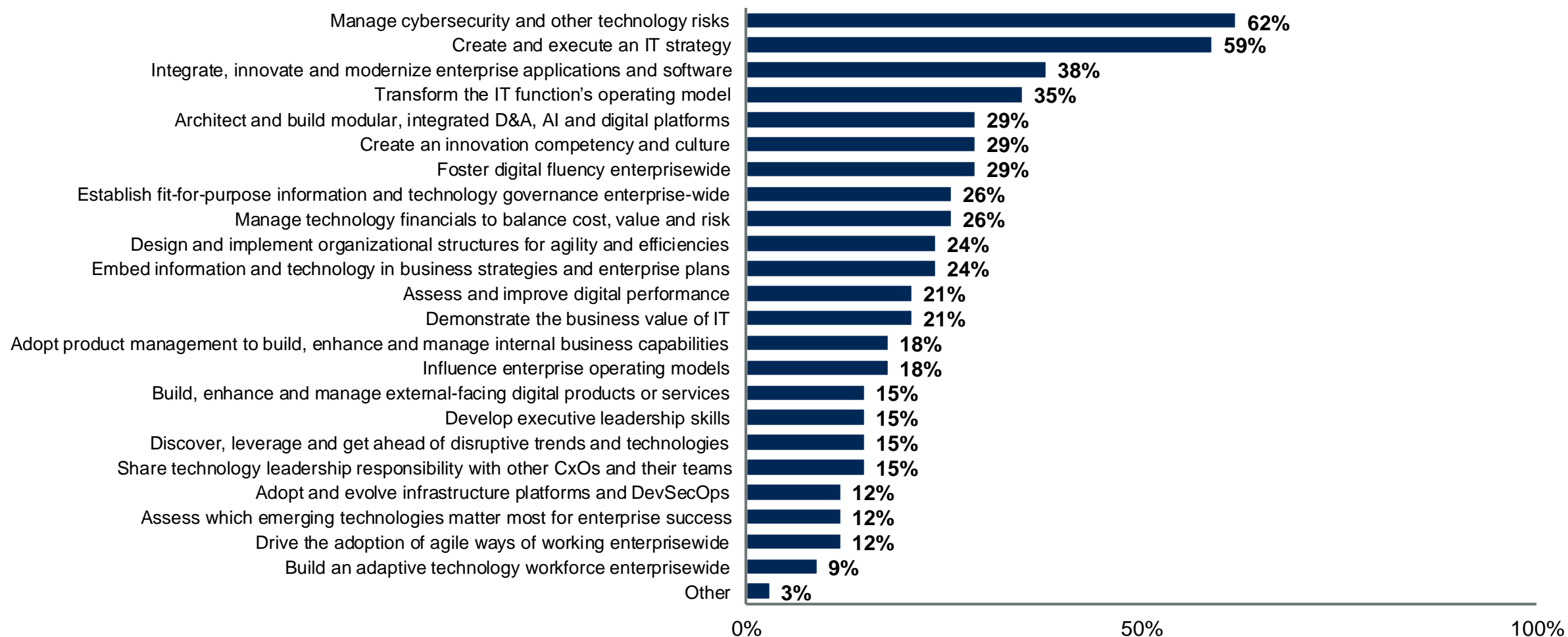
n = 21 Czech CIO Association CIOs and technology executives answering

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

## 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

# **Importance of Supporting Business Areas' Digital Execution**

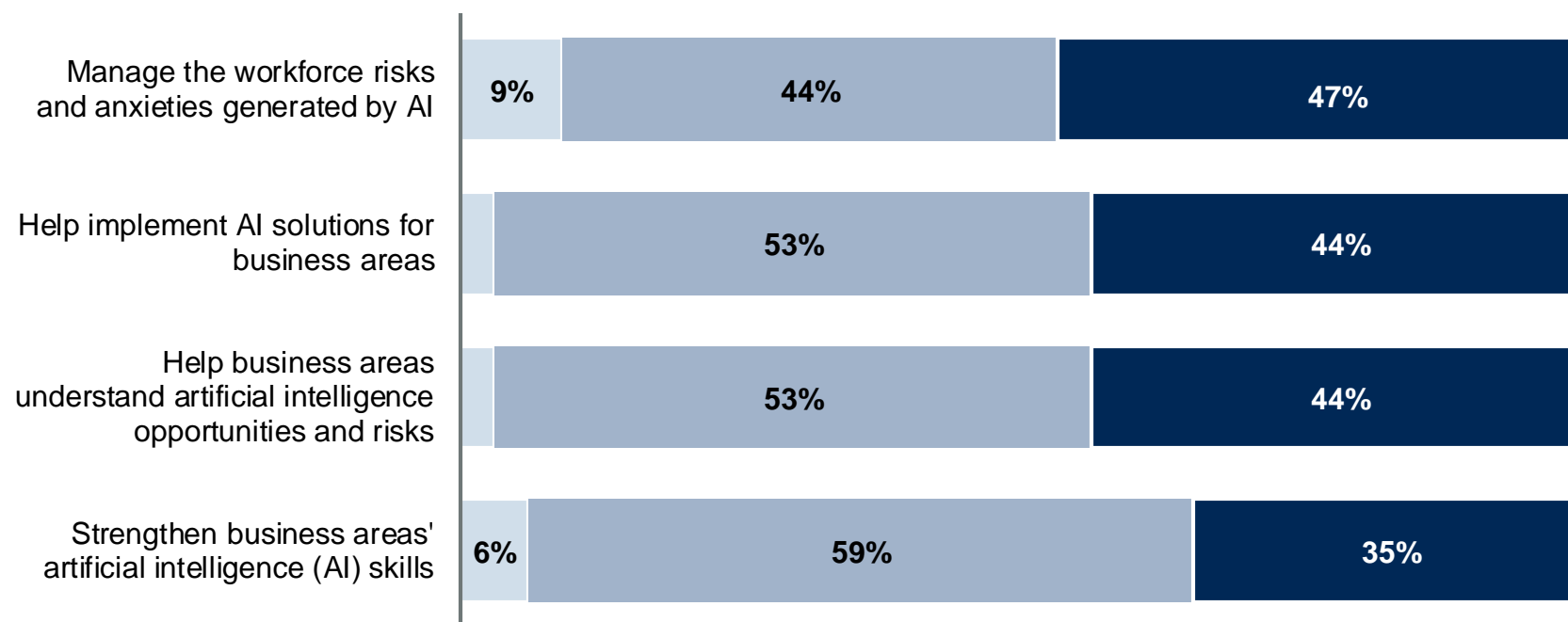


# IT's Role in AI Enablement for Business Areas

## 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 (6/7)



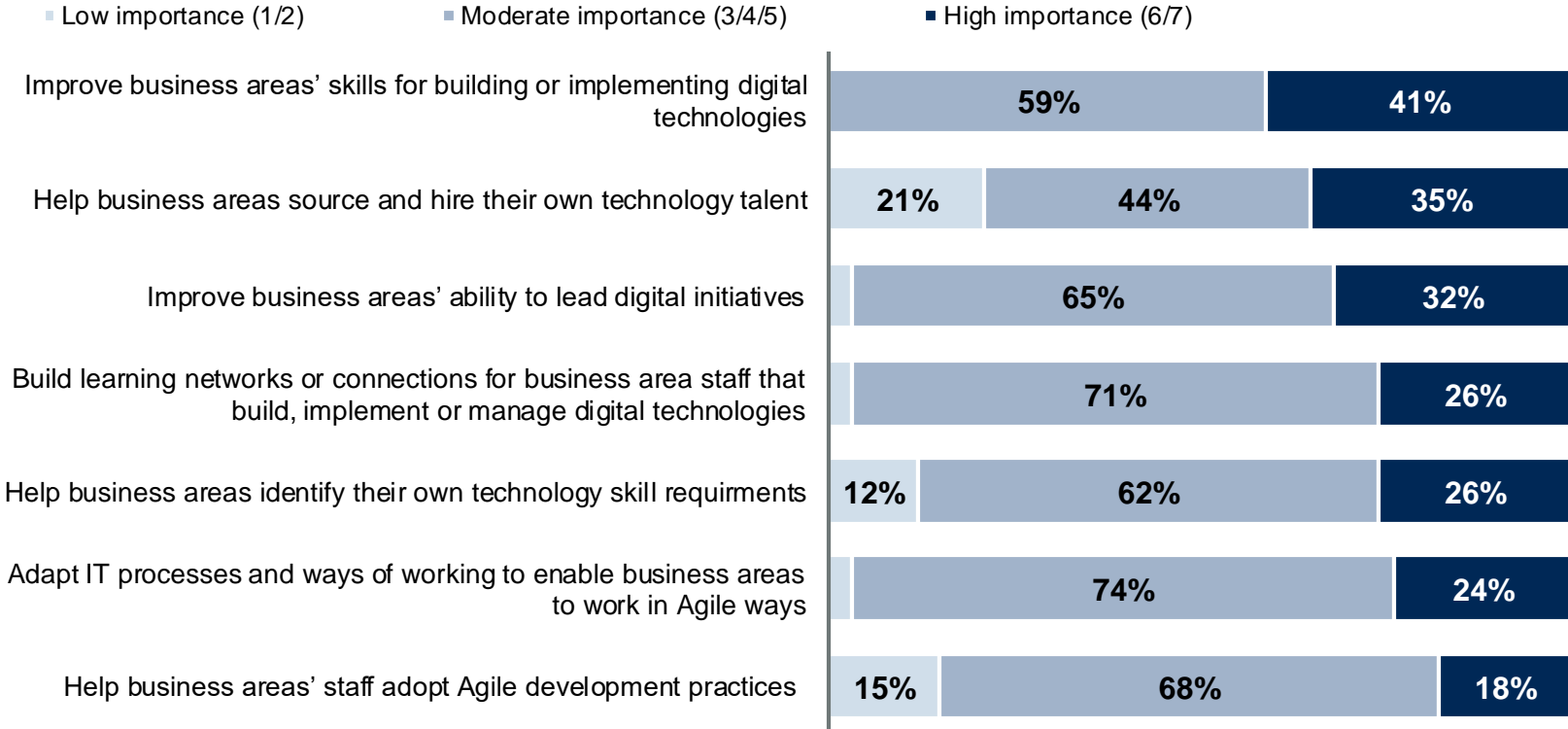
n = 34 Czech CIO Association CIOs and technology executives answering

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

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

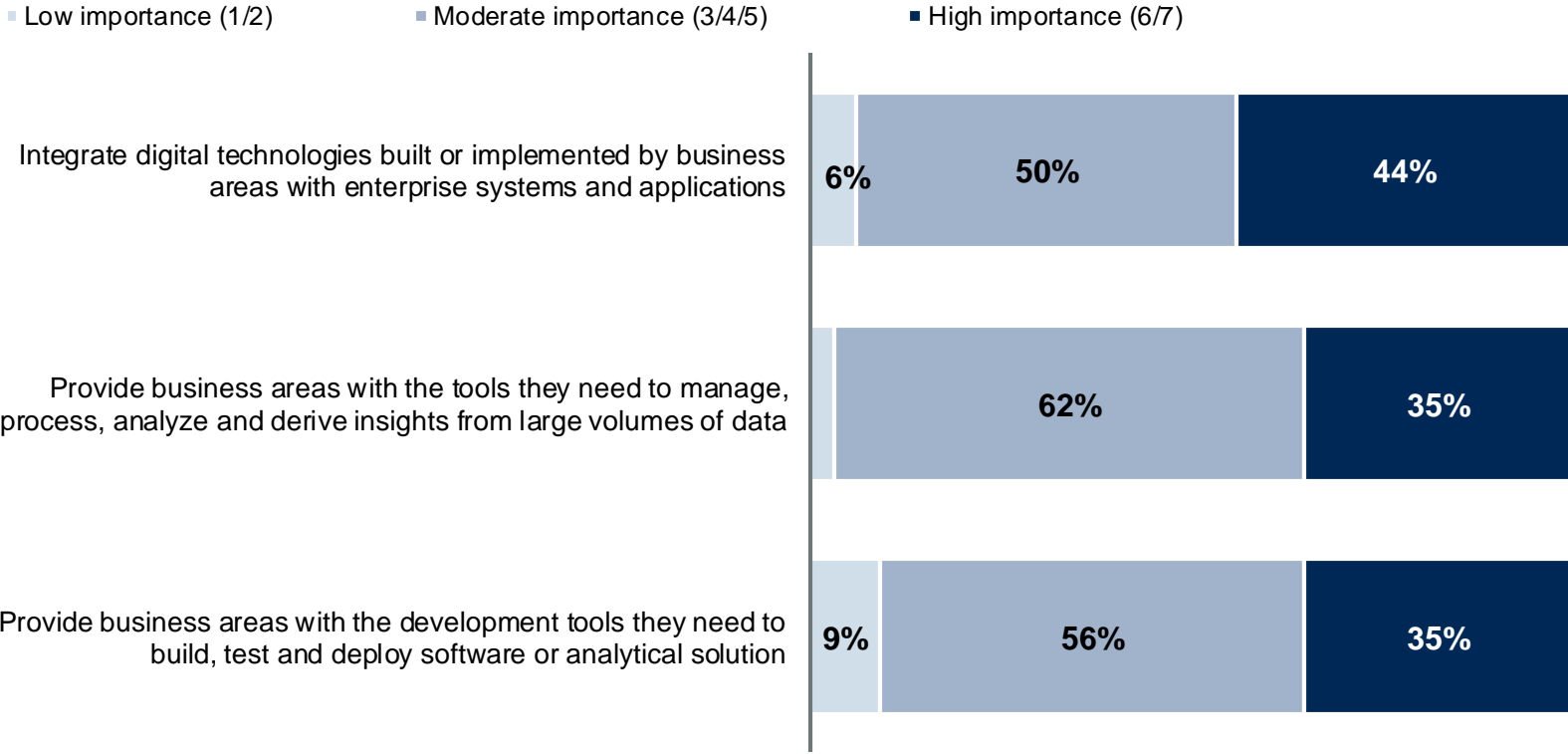
**Importance of IT Function to Perform These Tasks**  
 Scale of 1 (Not at all important) to 7 (Extremely Important)



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

# 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?

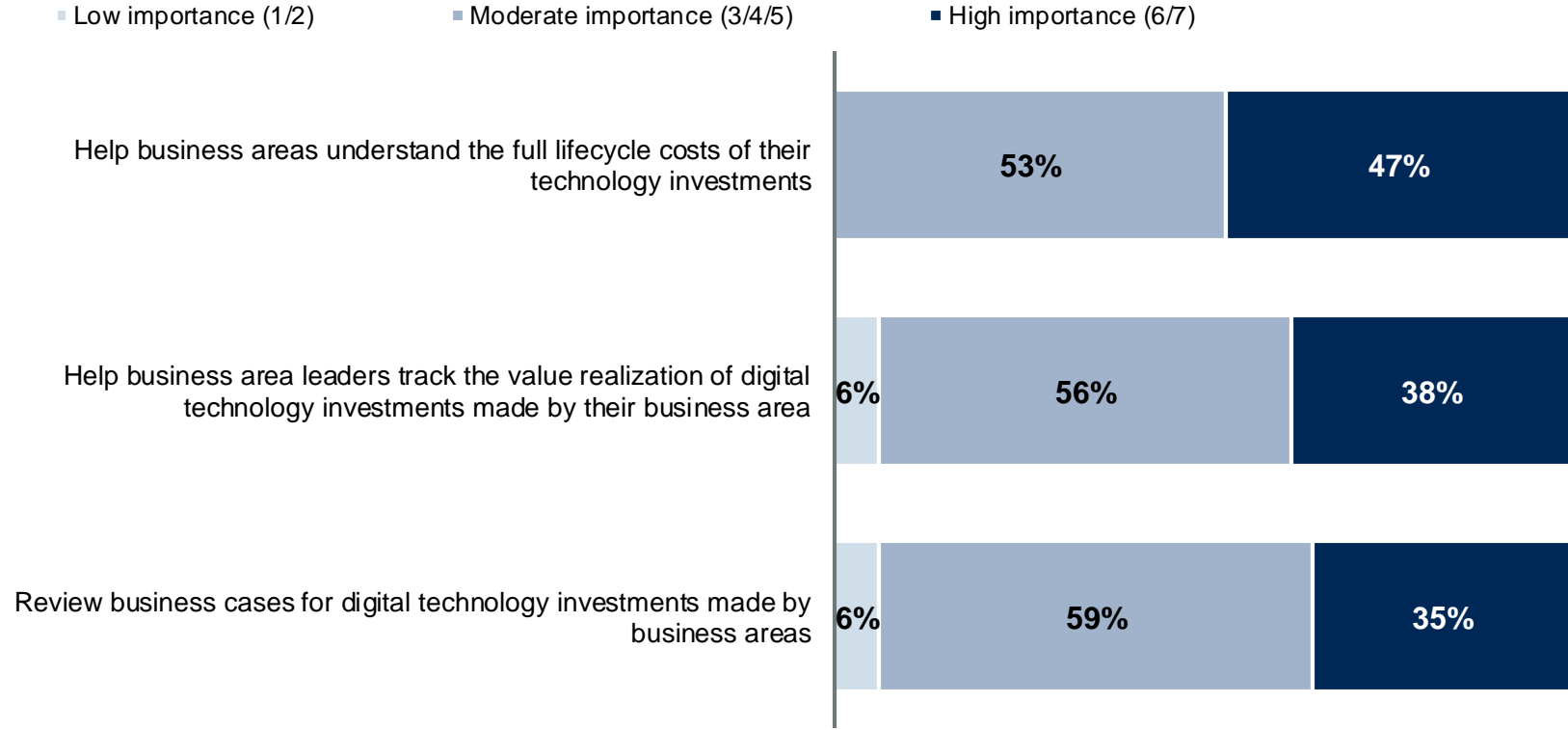
Source: 2025 Gartner CIO and Technology Executive Survey

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# 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)



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

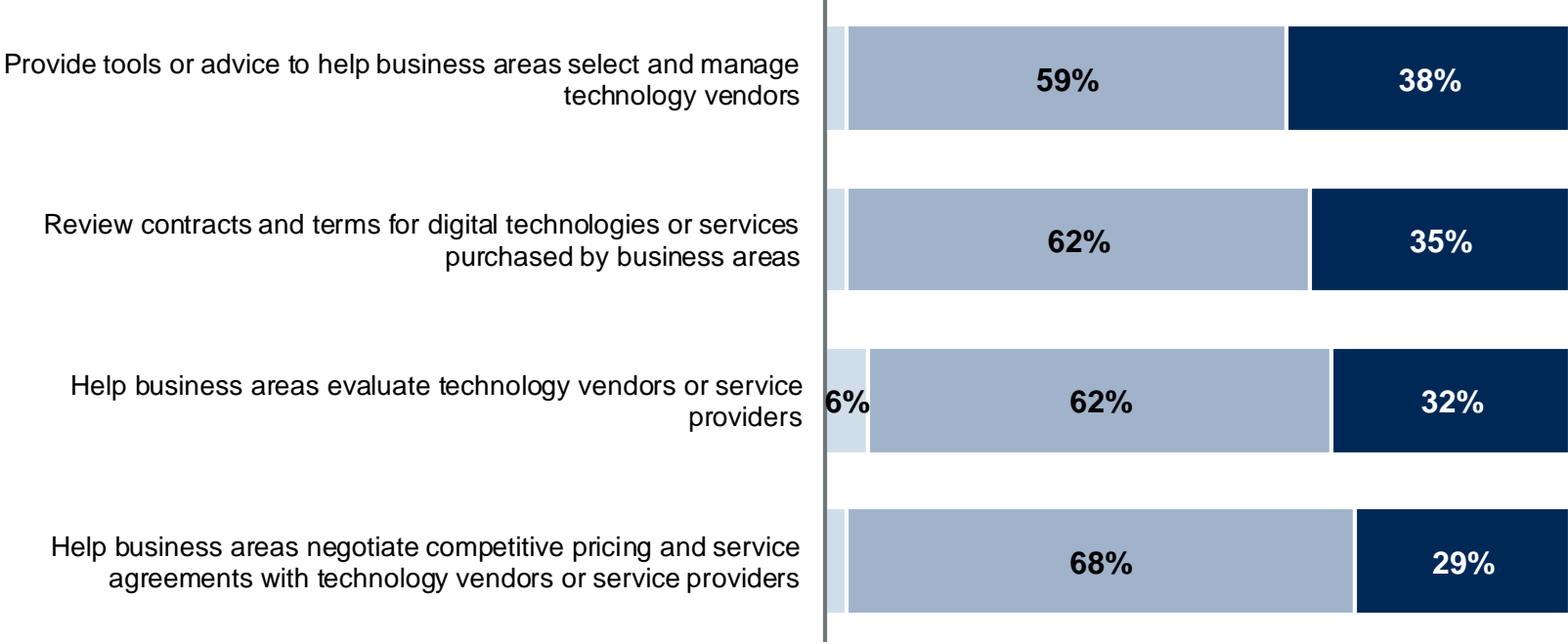
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# IT's Role in Providing Vendor Management Advice to Business Areas

**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 (6/7)



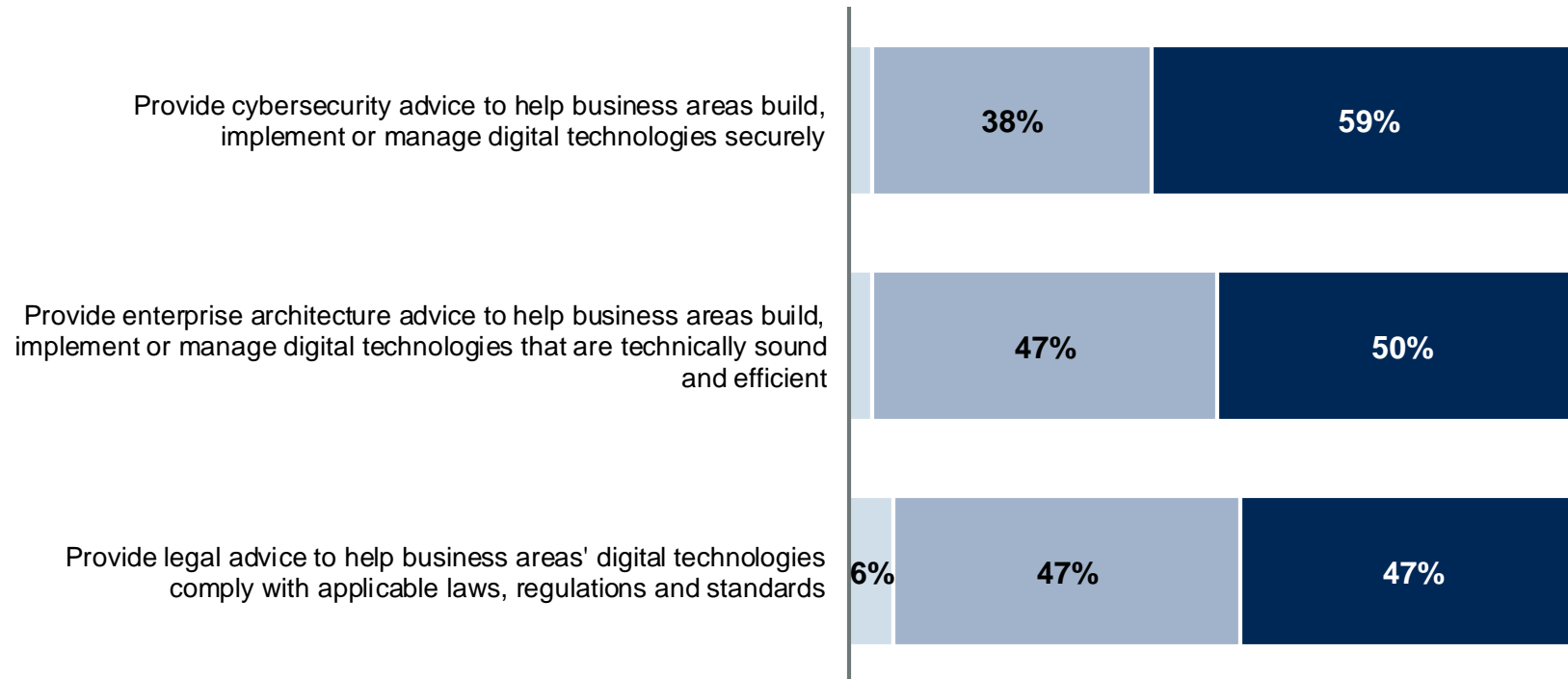
n = 34 Czech CIO Association CIOs and technology executives answering  
Q. How important is it that your IT function performs the following activities to help business areas maximize the value from investments in digital technologies?  
Source: 2025 Gartner CIO and Technology Executive Survey

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

## 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)



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

1

**Provide**  
easy-to-use,  
compelling  
platforms

2

**Instill**  
architectural  
awareness

3

**Co-Create**  
innovation with  
business areas

4

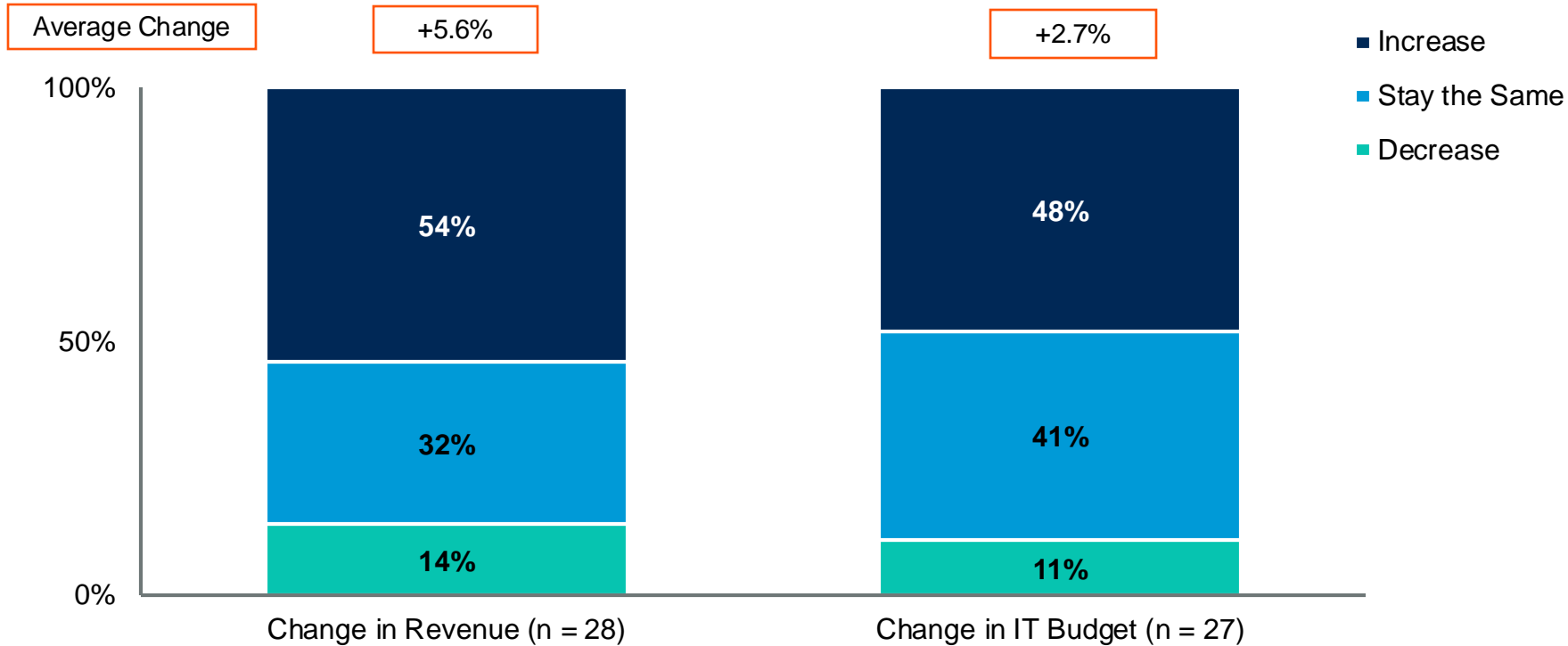
**Develop**  
business  
and IT  
technologists

# 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”

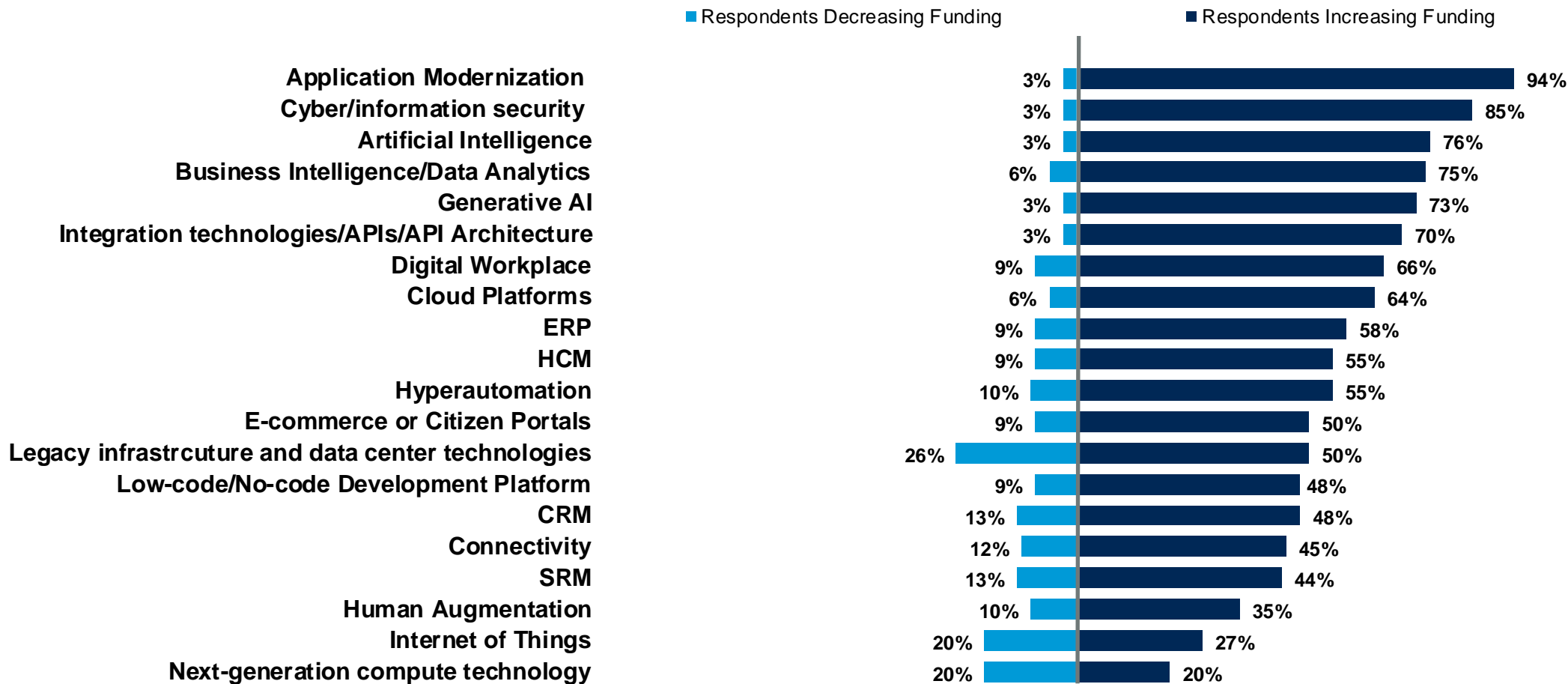
Q. By what percentage do you expect your enterprise's revenue to increase or decrease from 2024 to 2025?

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

# Changes in Technology Funding, from 2024 to 2025

## Percentage of Czech CIO Association Respondents



n = 34 Czech CIO Association CIOs and technology executives answering

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

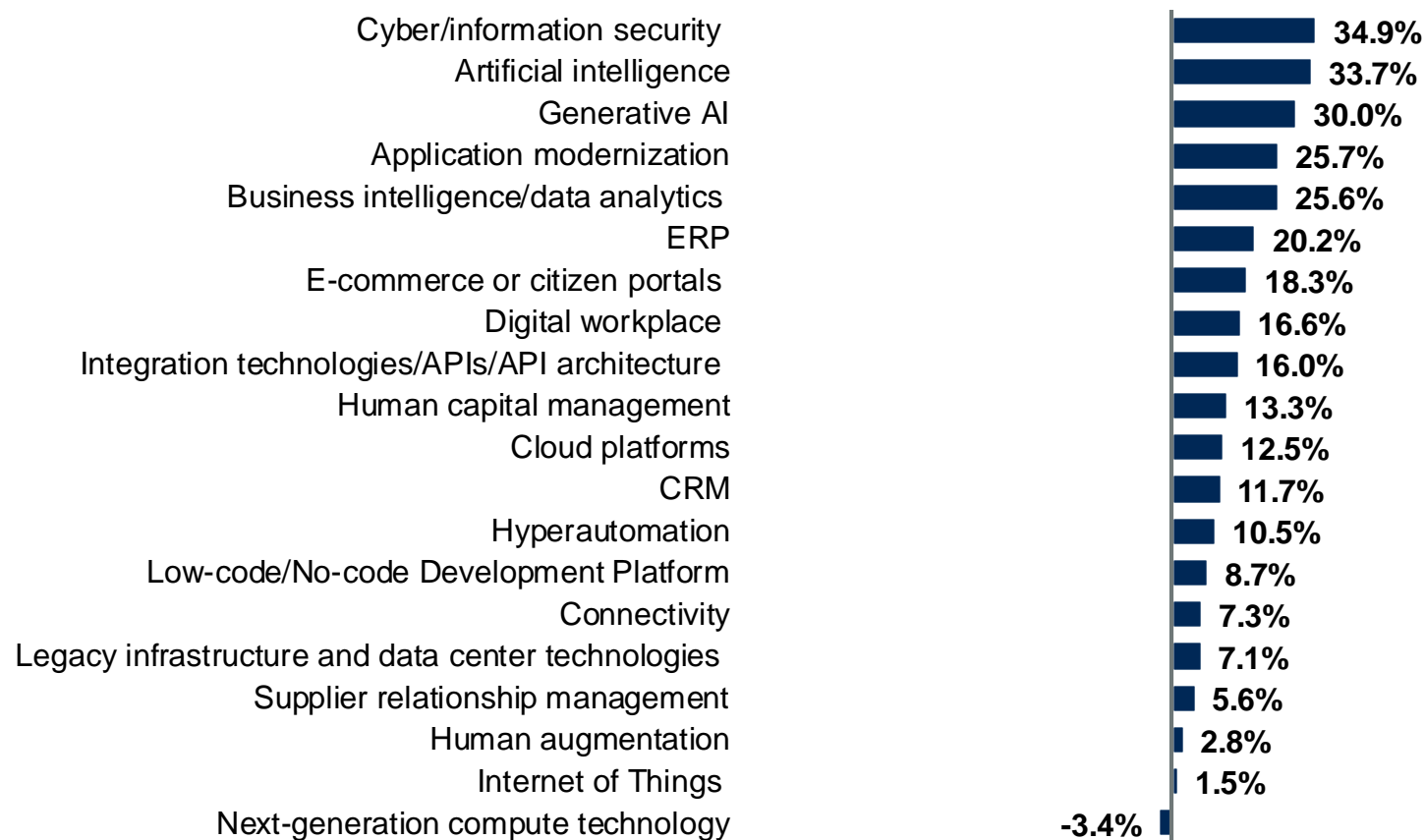
Note: Chart omits percentage of respondents to select "No Change in Funding"

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## Changes in Technology Funding

### Average Percentage Change (Mean) in Funding in 2025



n = 34 Czech CIO Association CIOs and technology executives answering

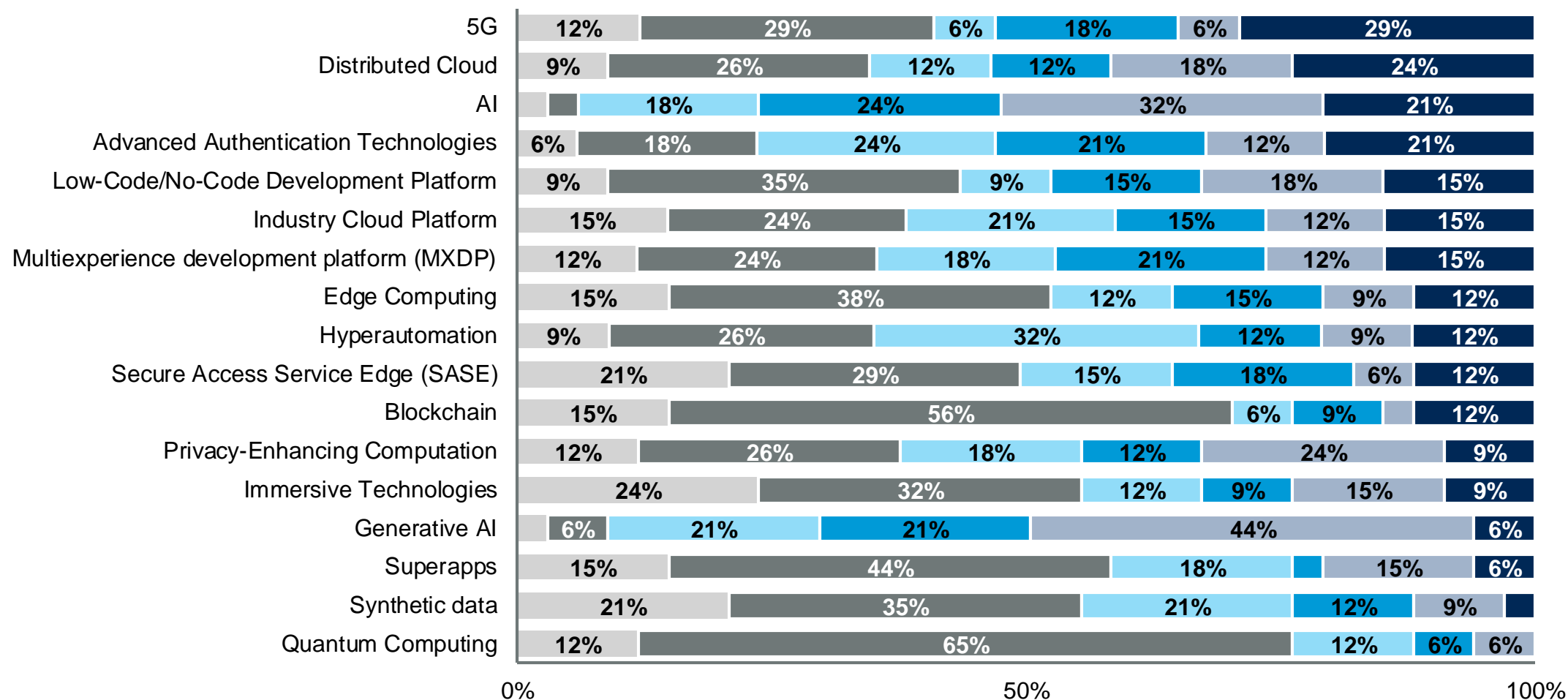
Q. For each of these technology areas, by how much will your enterprise increase or decrease funding in 2025 compared with 2024?

Source: 2025 Gartner CIO and Technology Executive Survey

# State of Deployment for Emerging Technologies

## Percentage of Czech CIO Association Respondents

■ Not Sure  
 ■ No interest  
 ■ Will deploy in 2-3 years  
 ■ Will deploy between 12 to 24 months  
 ■ Will deploy within next 12 months  
 ■ Have already deployed



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

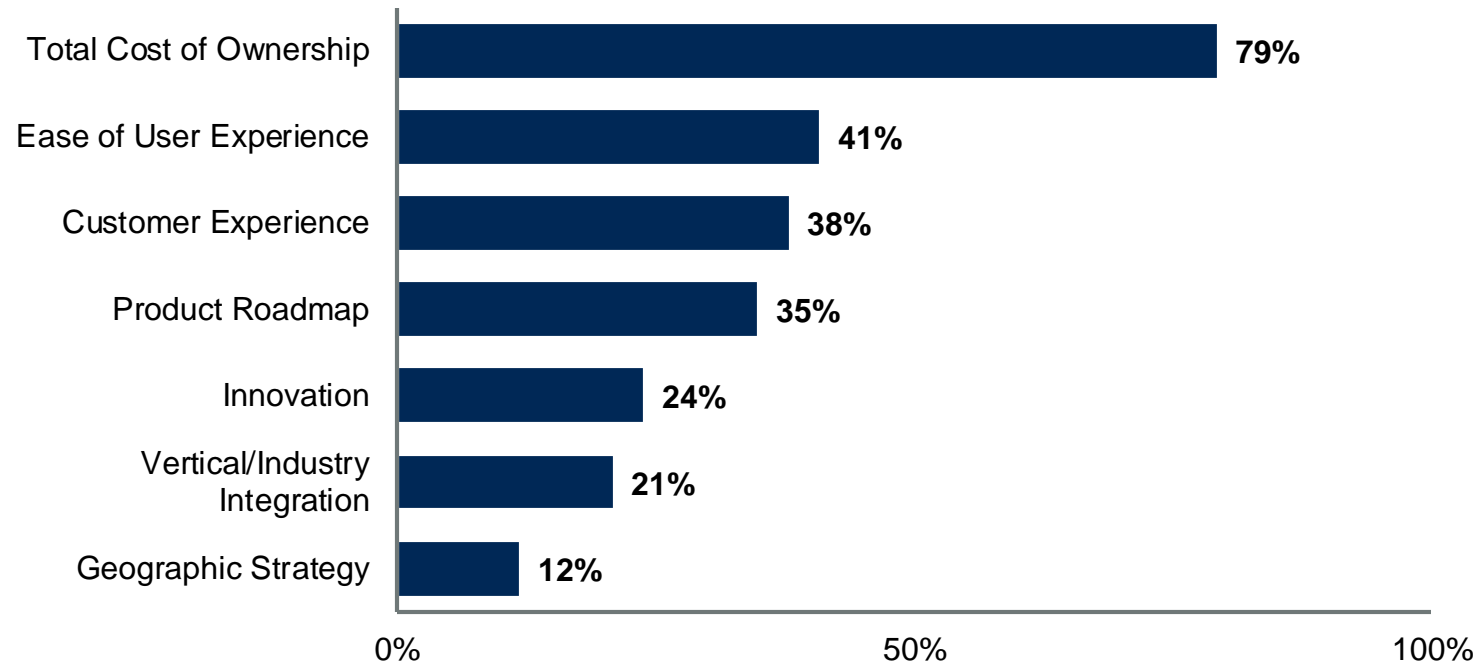
\*Not showing data labels for values less than 3%

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# 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



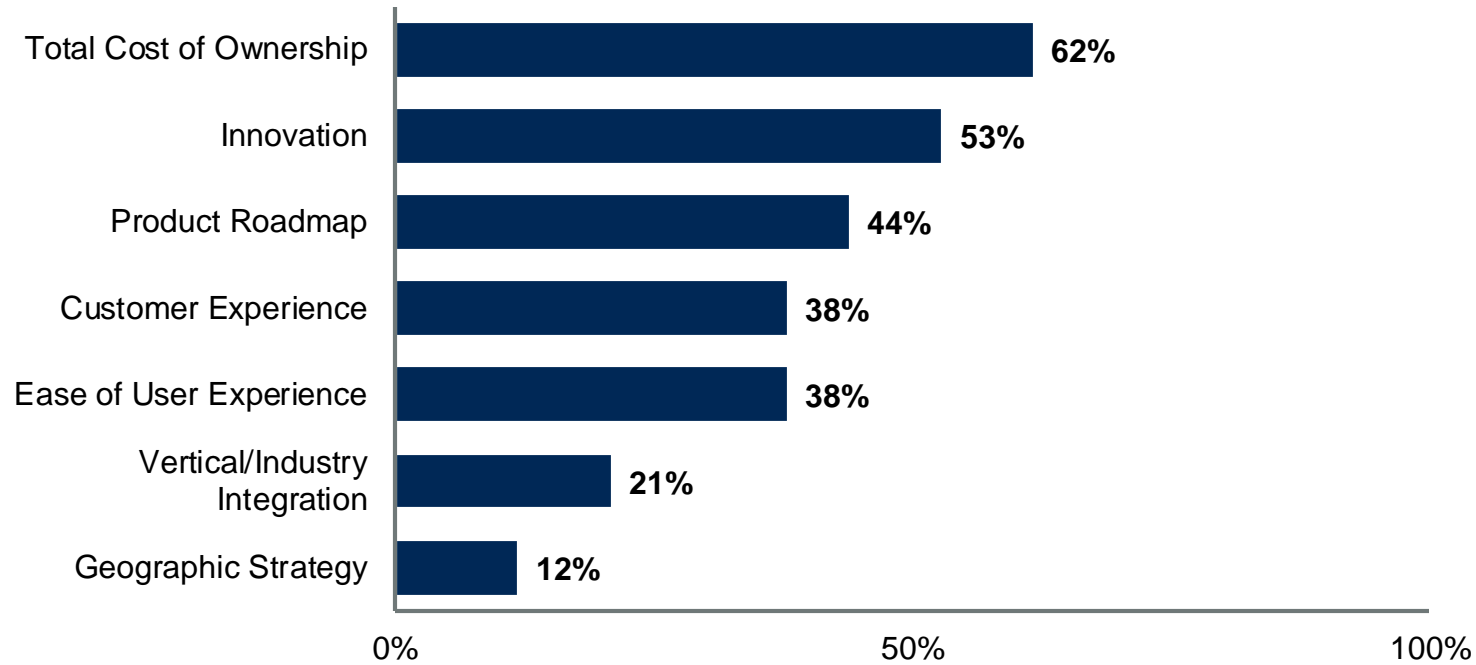
n = 34 Czech CIO Association CIOs and technology executives answering

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

# 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



n = 34 Czech CIO Association CIOs and technology executives answering

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

# Outcomes from Digital Technology Investments

# Outcomes from Digital Technology Investments

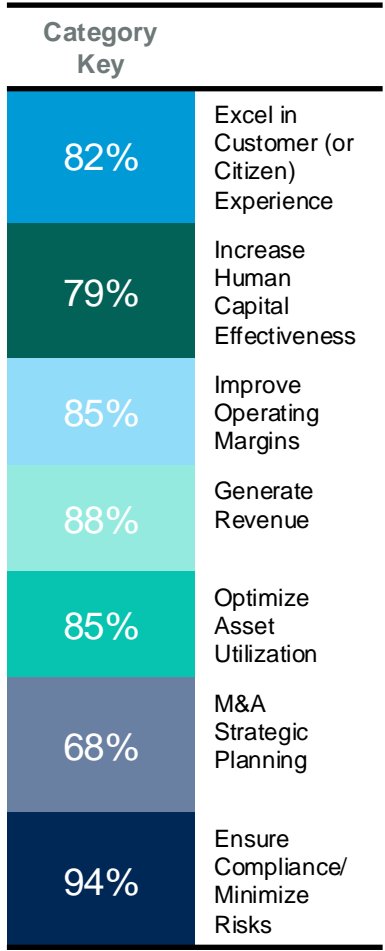
To understand which outcomes enterprises pursued with digital technology investments, we showed respondents a granular list of 27 options, from which they could choose nine. These 27 options are grouped into 7 overarching categories on the following slides:

<b>Improve Operating Margins</b>	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
<b>Ensure Compliance/Minimize Risks</b>	Enterprise risk management; Comply with laws and regulations; Analyze or manage risks; Adopt industry standards; Environmental, social, governance (ESG) or sustainability
<b>Excel in Customer (or Citizen) Experience</b>	Improve the customer/citizen experience; Improve quality of our service channels; Increase customer/citizen engagement
<b>Increase Human Capital Effectiveness</b>	Improve the employee experience from hire to retire; Improve the digital workplace (e.g., collaboration, hybrid work); Increase diversity, equity, and inclusion (DEI)
<b>Generate Revenue</b>	Acquire new customers; Retain existing customers; Grow revenue from existing customers (e.g., cross-sales, upsales); Develop, market or launch new products or services
<b>Optimize Asset Utilization</b>	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
<b>M&amp;A and Strategic Planning</b>	Strategic planning; Mergers, acquisitions, divestitures, partnerships



# Most Critical Outcomes from Digital Technology Investments

Multiple Responses Allowed



n = 34 Czech CIO Association CIOs and technology executives answering

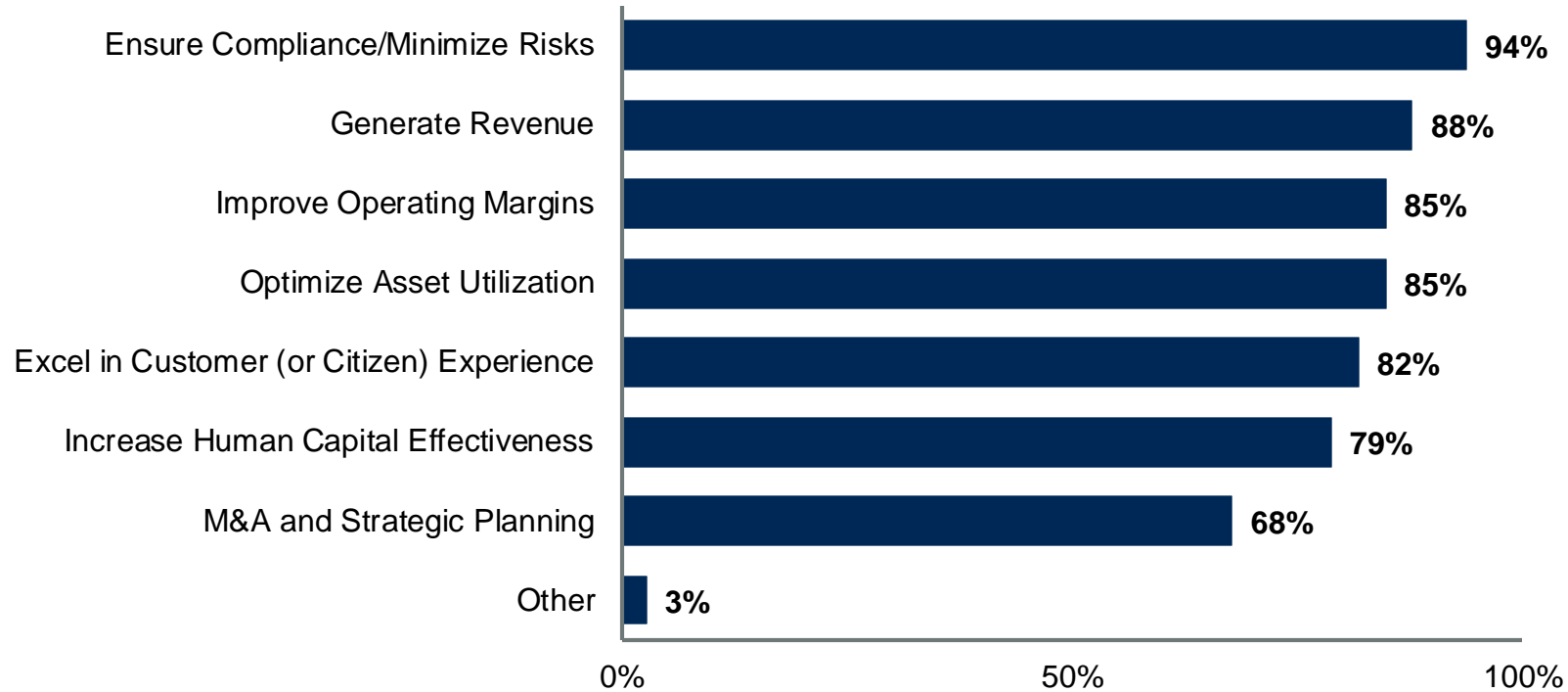
Q. Thinking about your enterprise's investments in digital technologies, which types of outcomes are most critical to your enterprise?

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



n = 34 Czech CIO Association CIOs and technology executives answering

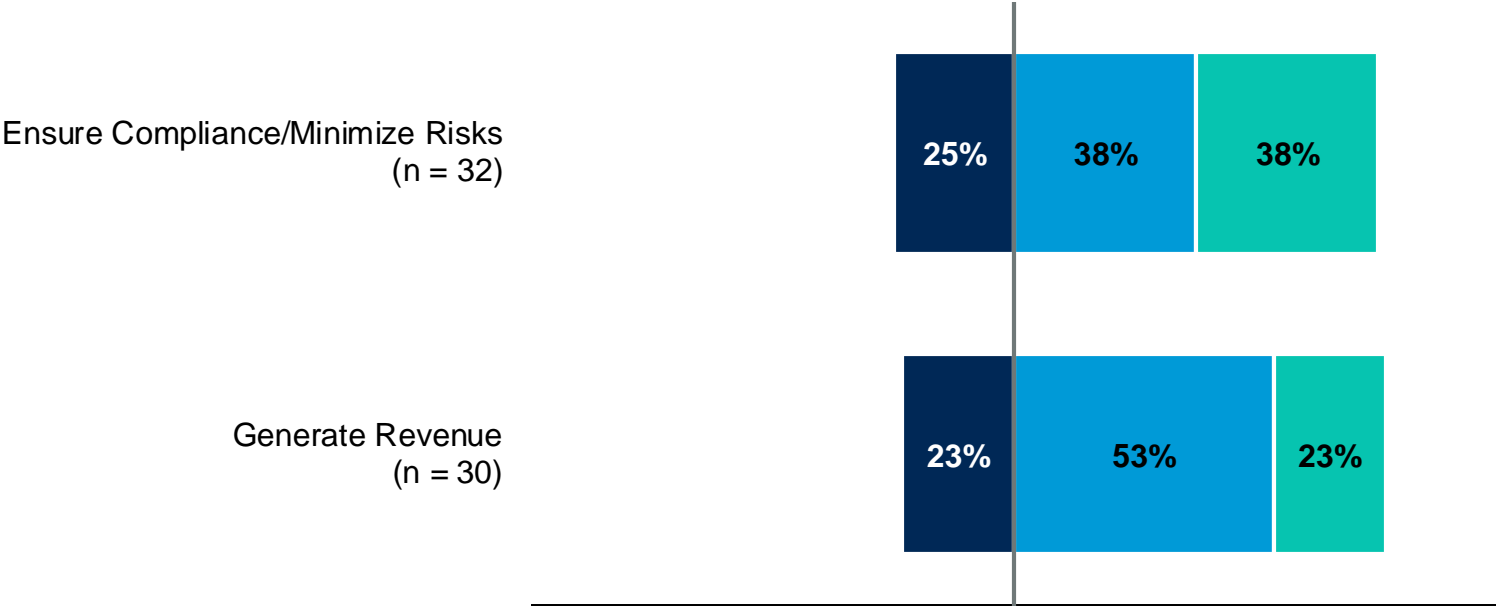
Q. Thinking about your enterprise's investments in digital technologies, which types of outcomes are most critical to your enterprise?

Source: 2025 Gartner CIO and Technology Executive Survey

# Performance of Digital Technology Investments – All Categories

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

■ Below CEO Expectations   ■ Met CEO Expectations   ■ Exceeded CEO Expectations



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

## 2025 CIO Agenda: Grow the Digital Vanguard

# Make It Easier to Lead and Build Digital Together With IT

1

**Provide**  
easy-to-use,  
compelling  
platforms

2

**Instill**  
architectural  
awareness

3

**Co-Create**  
innovation with  
business areas

4

**Develop**  
business  
and IT  
technologists



**QA**



# BACKUP