Infobrief sponsored by Expereo | June 2024

Enterprise Horizons 2024

Technology Leaders' Priorities on Their Digital Business Journey


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Executive Summary

This IDC InfoBrief analyses the business opportunities, challenges, and priorities influencing global technology leaders that are presently striving to achieve digital maturity and fully exploit the AI momentum. This analysis is based on the latest results from the Enterprise Horizons 2024: IDC Technology Leaders Survey.

Key takeaways: In 2 years

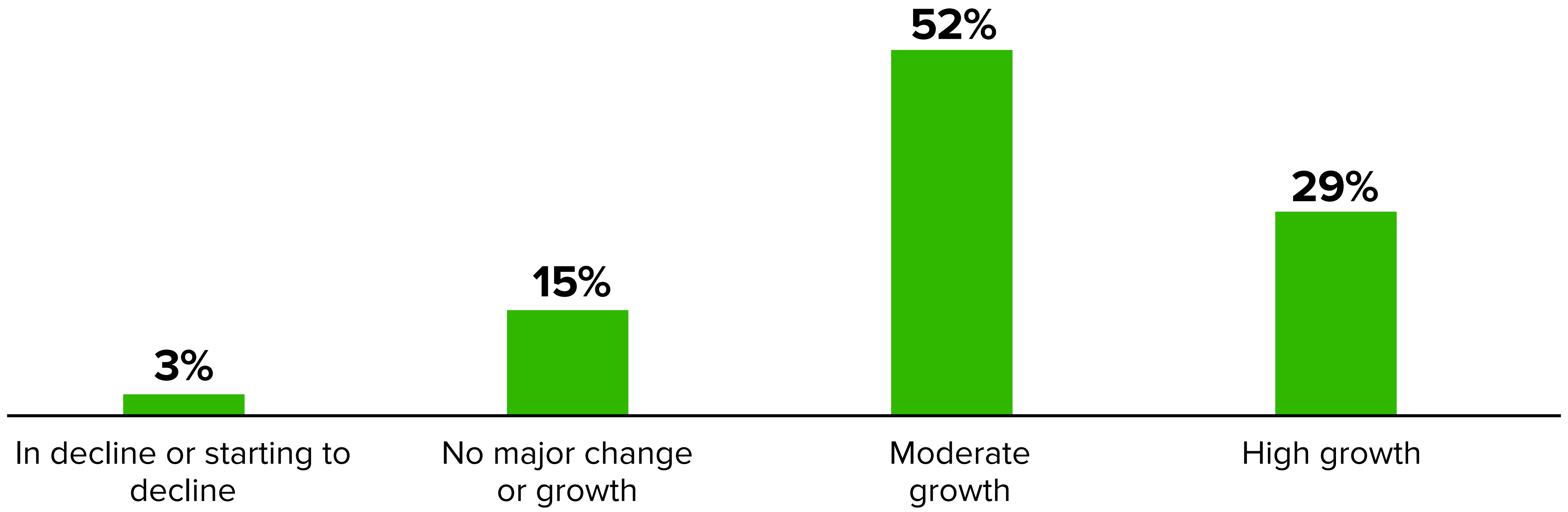
- **There is positivity out there** - Although the global macroeconomic environment remains unstable and unpredictable and digital business gaps persist, there are high growth expectations and positive outlooks fueled by the “AI everywhere” wave and its potential disruptive impact on digital businesses.
- **Technology investments remain key** - As technology investments remain essential for organisational transformation, efficiency, resilience, and adaptability, technology leaders will need to take further digital maturity leaps and focus on AI, skills, and solid network and infrastructure backbones.
- **AI is real** - Companies are already getting ready and moving forward with AI, entrusting aspects of their security to the technology. However, ethics is a leading concern, and prioritizing the right use cases is critical.
- **Augmented and new skills are emerging** - Due to skill shortages, organisations are reigniting their talent acquisition and reskilling plans, adopting new ways of working, and evaluating how to support workers regardless of location and digital setup.
- **Everything relies on the network, yet many networks are not ready for the future** - Companies know what they need from networks to achieve their goals. Specifically, they want service providers to deliver reliable, flexible, and agile networks with visibility/observability features and cloud connectivity. Ultimately, network performance drives application performance, and as such a flexible, high-performing network is essential for company growth in a cloud-based digital business environment.
- **Technology leaders are called to step up and become digital business leaders** - Technology leaders are expected to contribute to business growth, manage risk by strengthening digital resilience, and modernise IT to achieve better business outcomes. Technology leader priorities will be more and more focused on orchestrating and leading digital transformation, with a focus on business agility improvement and new revenue streams generation.

Source: IDC Technology Leaders Survey, March 2024 (N = 650)

High Business Growth Expectations, with a Focus on Increased Automation, Efficiency, and Innovation

Organisations around the globe are optimistic about their business outlooks for the months ahead. In fact, 42% of very large organisations expect strong future growth in the coming years. Similarly, there are positive expectations across regions. Respondents from APAC are the most positive, with 35% of respondents from this region having "high growth" business expectations.

Overall business outlook for the next 12 months



Business growth based on three key pillars

49% Increased Automation

44% Cost Containment & Efficiencies

39% Increased Innovation

Organisations are planning to deliver global growth in different ways in the next 12 months

All this is happening at a technological and economic inflection point where business is becoming increasingly digital, marking the advent of what is called the "digital business era", in which:

40% of CEOs lead digital initiatives directly alongside technology leaders

#1 priority of technology leaders is to contribute to business growth/ increased turnover

68% of technology leaders agree that the pace of current technology innovation makes this the most exciting time to be a technology leader

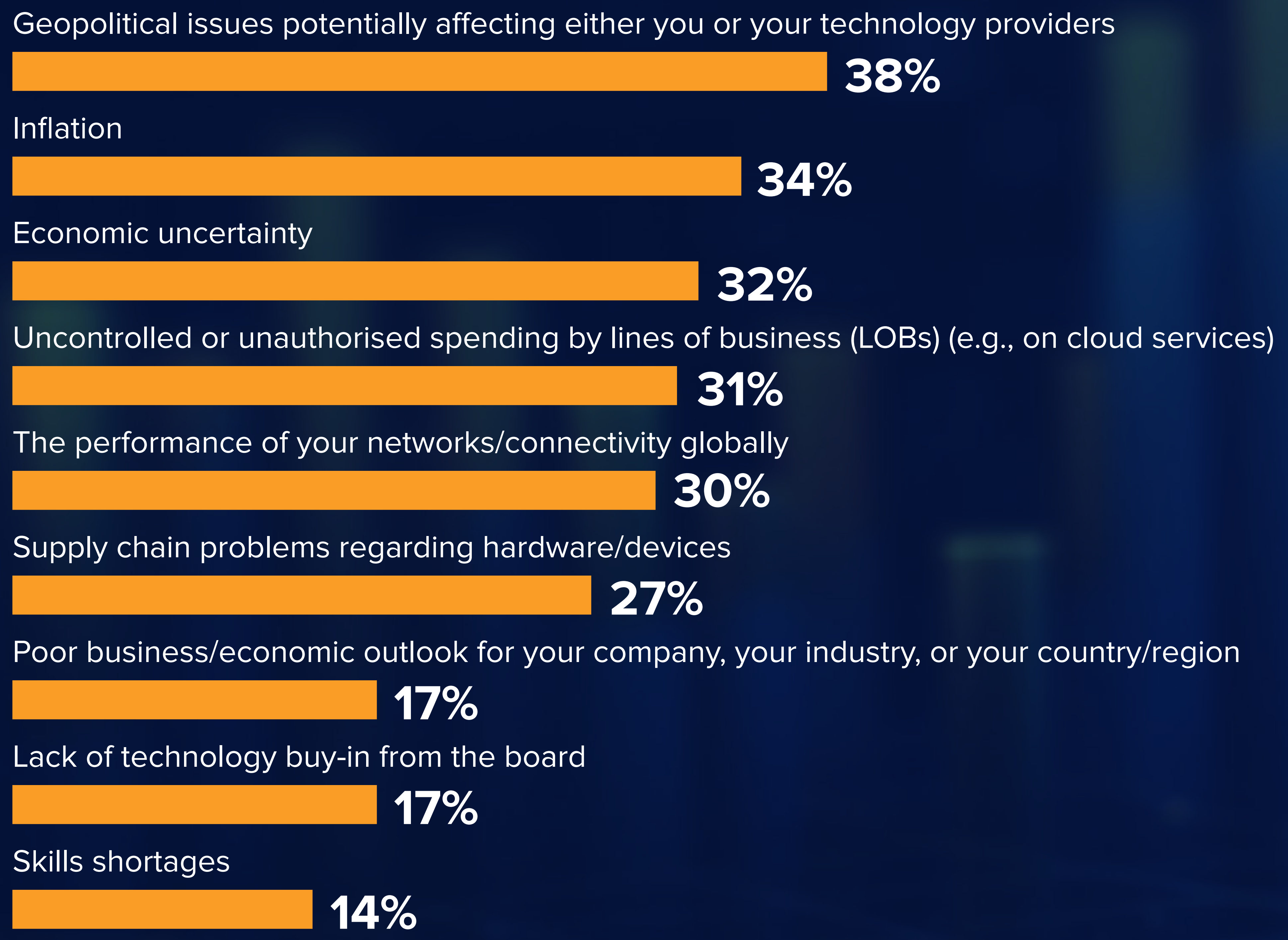
31% of global organisations consider AI/machine learning (ML) critical for fulfilling business priorities

Source: IDC Technology Leaders Survey, March 2024 (N = 650)

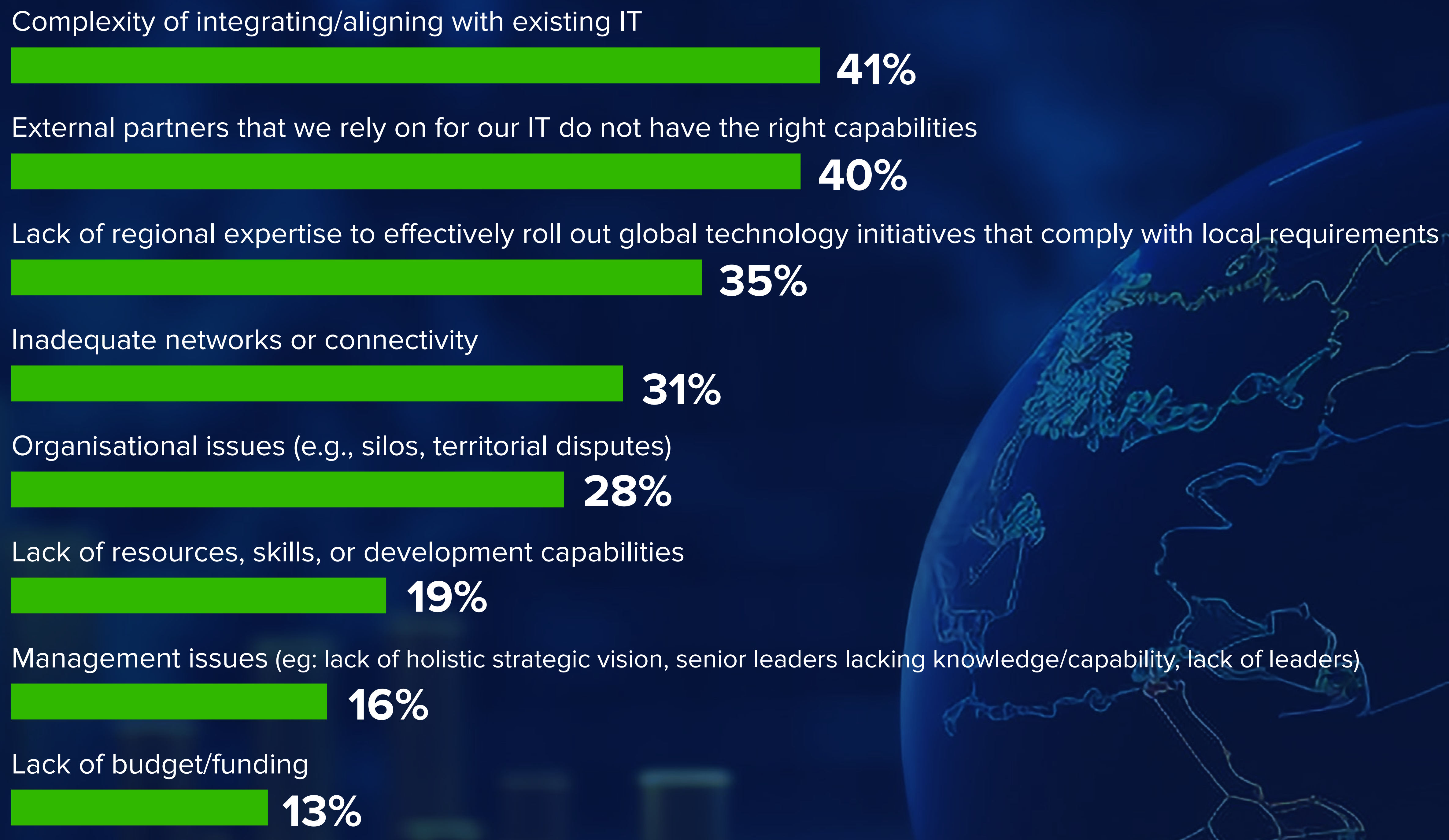
The Global Macroeconomic Environment Remains Unstable and Unpredictable and Digital Business Gaps Persist

The global macroeconomic environment remains unstable and unpredictable. New and well-known headwinds are shaking global organisations, with geopolitical issues, inflation, and economic uncertainties being the main inhibitors and threats to organisational growth ambitions in 2024.

There are also risks and inhibitors to growth ambitions over the next 12 months:



Most serious challenges to executing digital initiatives in the organisation are:

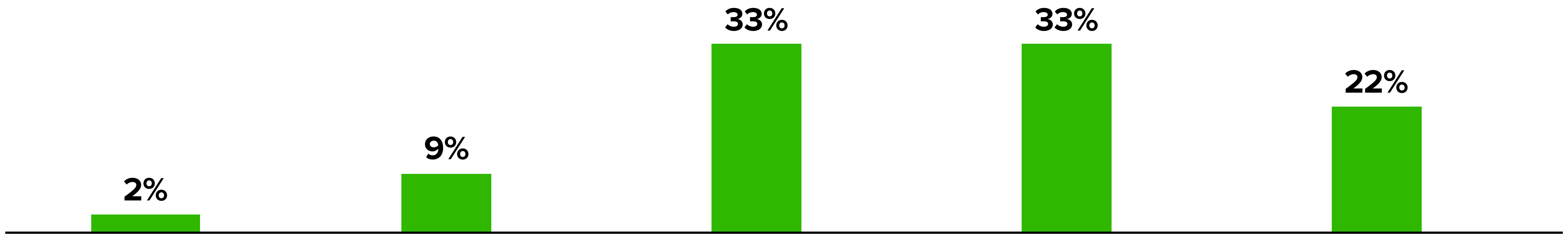


At the same time, there are pressing challenges hampering organisations' digital ambitions that need to be fixed. IT integration complexity, limited partners' capabilities, lack of regional expertise, and poor networks or connectivity are the main technical and cultural/human digital business gaps.

Source: IDC Technology Leaders Survey, March 2024 (N = 650)

To Enable a Full Digital Business Future, a Further Digital Maturity Leap is Required

Q: How would you assess your organisation's digital strategy and initiatives?



Disconnected: Digital initiatives are tactical and disconnected from enterprise strategy.

Functional: Initiatives at the function or line-of-business (LOB) level, with some connection to enterprise strategy.

Short-term focus: Digital initiatives are enterprise-oriented but typically have a short-term focus.

Integrated: Continuous and integrated enterprise-wide digital innovation is in place, aligned with operations and customer/service experiences.

Digital first: A longer-term investment plan and a digital-first enterprise strategy are in place with the aim of using digital capabilities to transform markets and customers by creating new business models and product/service experiences.

Although the pandemic has been a catalyst of digital acceleration, only 22% of global organisations have achieved full digital maturity – these organisations have a long-term digital business strategy in place and an orchestrated, enterprise-wide digital-first trajectory. However, the reality is that most global organisations are still working on opportunistic and short-term digital plans, with isolated and siloed digital capabilities across IT and business units.

As technology investments remain essential for organisational transformation, efficiency, resilience, and adaptability, technology leaders need to pivot toward:

- **AI and Other Emerging Technologies**
- **Talent, Skills, and Humans at the Centre**
- **Solid Network and Infrastructure Backbones**

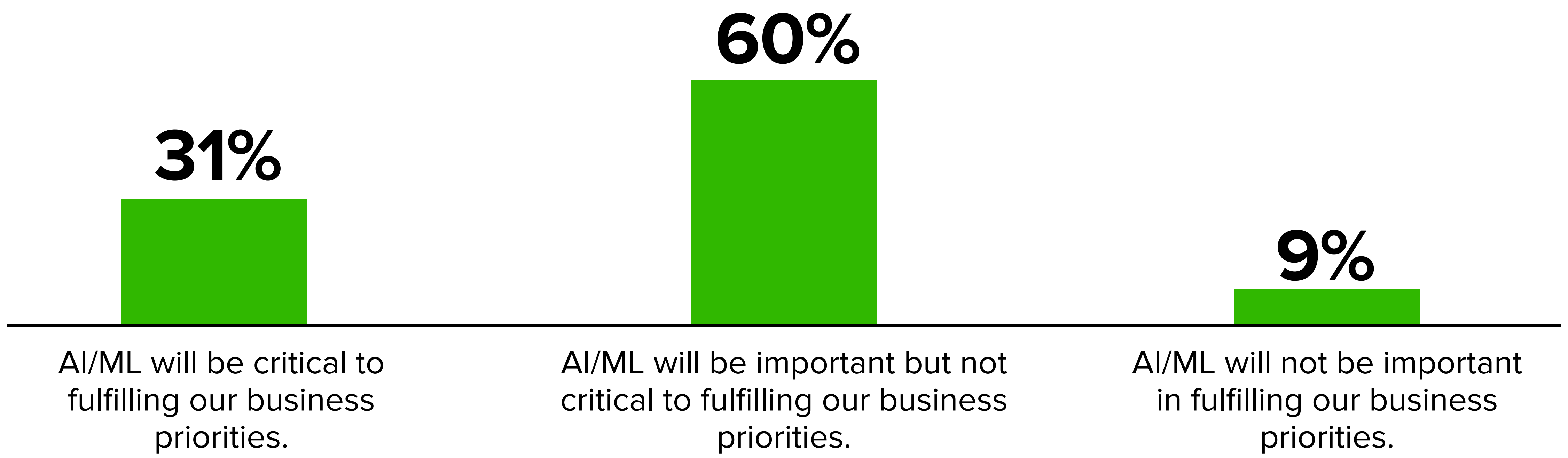
Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Companies are Evaluating AI and Other Key Technologies to Achieve Digital Maturity and Facilitate Business Growth Through the Three Pillars of Automation, Optimization, and Innovation

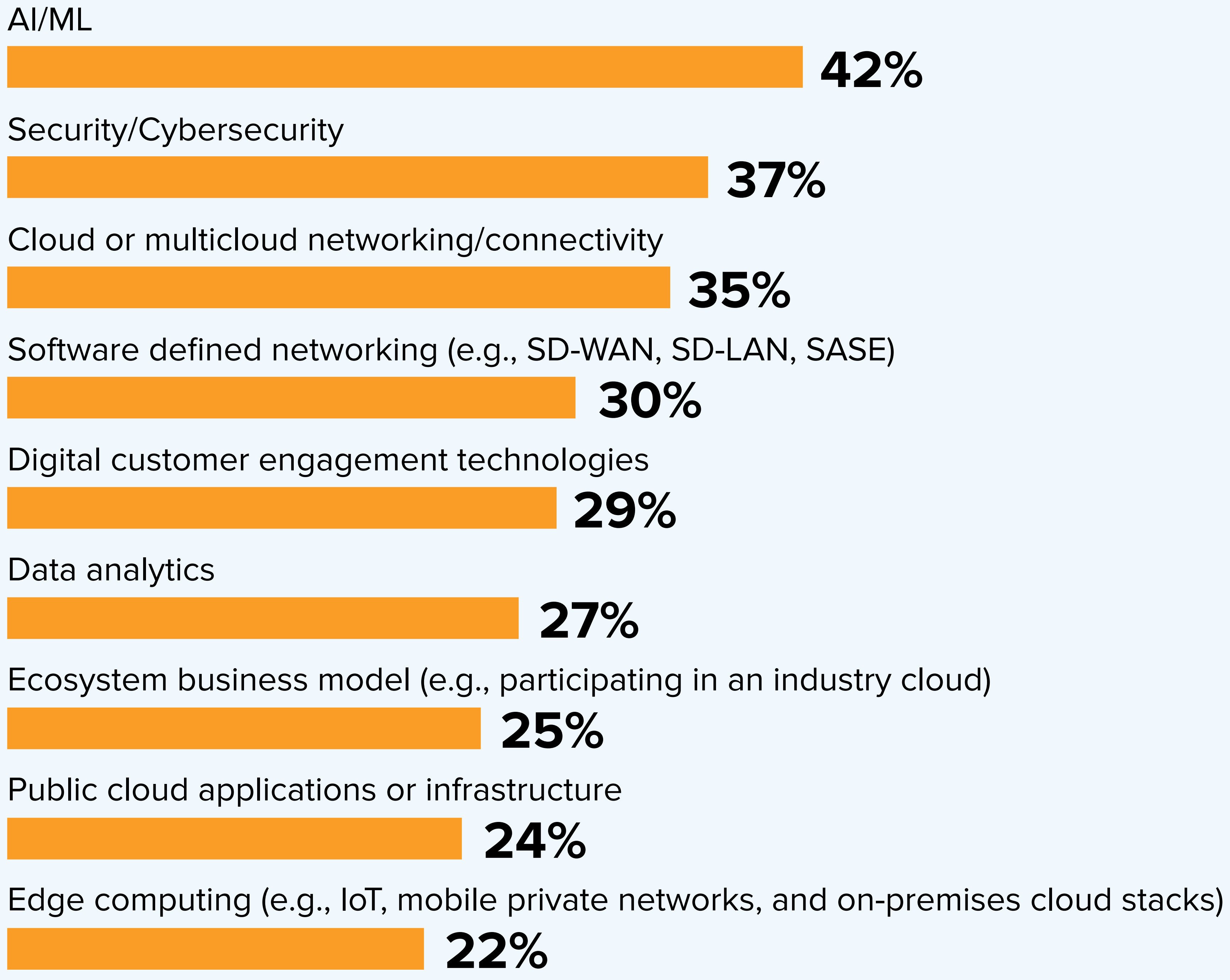
AI has come from nowhere to dominate today's technology agenda: it is now the leading technology priority, ahead of even security and cloud. Because AI will impact the internal and external operations of organisations in every industry over time, companies are rushing to understand and capitalise on its potential. Nearly a third already believe it will be a critical contributor to business success.

However, security and cloud, as well as cloud connectivity, remain high on the agenda, and all three are crucial components of any organisation's AI strategy. The lack of skills and AI training infrastructure means that training AI models at scale will be done in the cloud, over networks that are enhanced and optimised for cloud and multicloud access.

Q. To what extent do you see AI/ML contributing to your business priorities?



In terms of effort and/or financial investment, organisations will prioritise several technologies in the next 12 months.

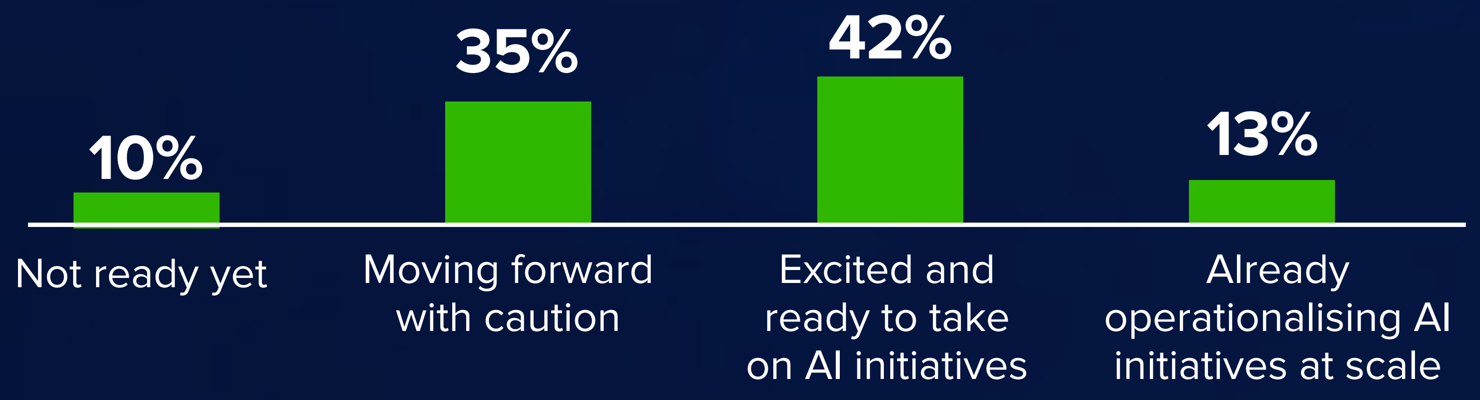


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Companies Are Already Getting Ready and Moving Forward with AI and Entrusting Aspects of Their Security to the Technology. However, Ethics is a Leading Concern

Some 69% of businesses are preparing to take on AI or are already using it at scale. AI readiness is strongly linked with a company's size, overall growth prospects, and digital maturity level. As such, AI is set to further widen the gap between leaders and laggards, even at this early stage.

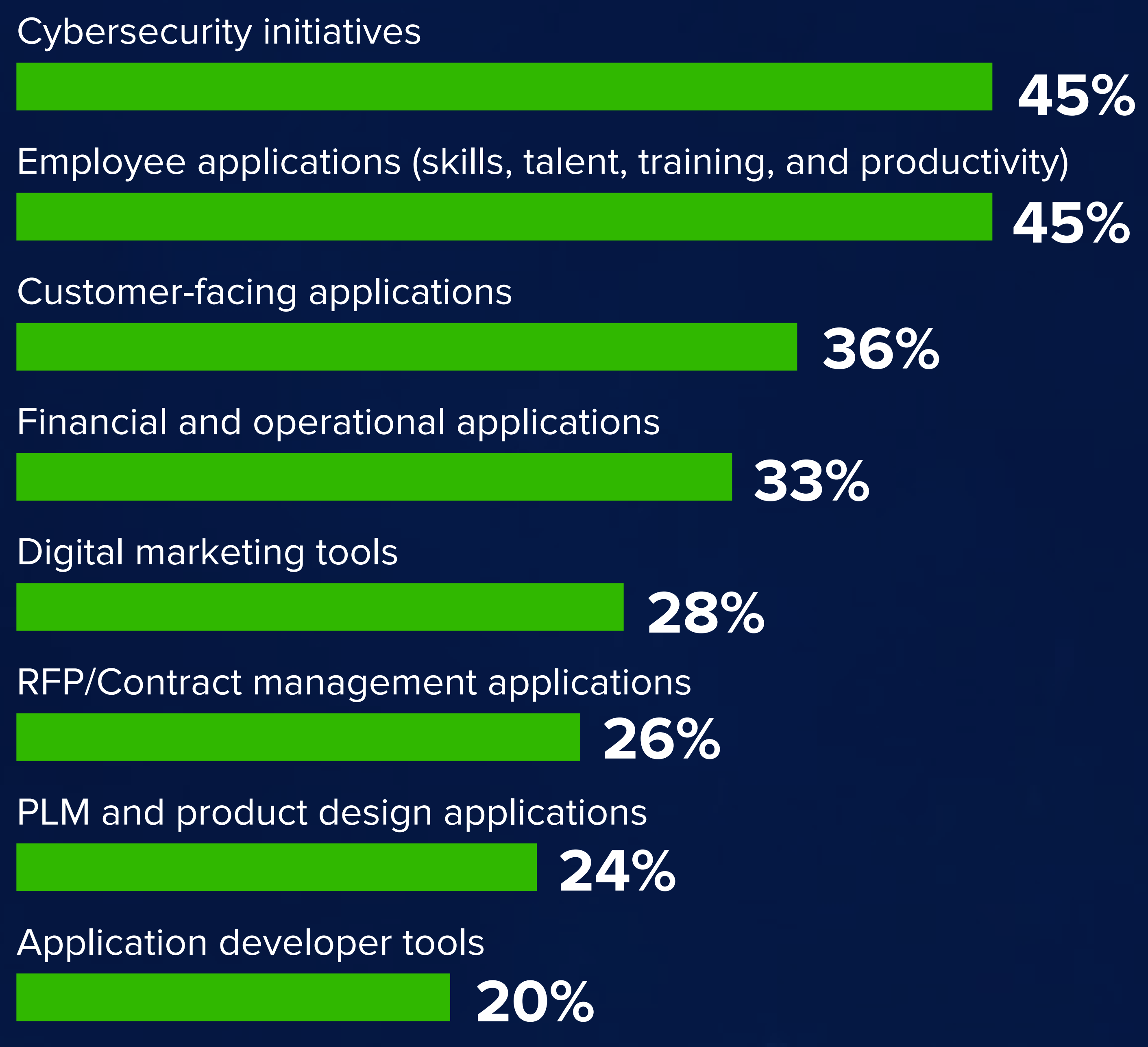
Organisational readiness to take on AI initiatives is moderate



The fact that cybersecurity will be the most common use case for AI over the medium term, alongside internal employee apps, indicates that companies have already established a level of trust in the technology that will carry through to other areas of business.

However, the concern over possible issues relating to AI governance or ethics is the leading obstacle (by a significant margin). AI technology is powerful but carries risk and requires careful oversight. Companies need partners that can help them navigate this uncharted territory; however, existing partners' lack of capabilities is the second obstacle identified by organisations.

Over the next 2-3 years, organisations will prioritise various AI initiatives



There are also significant obstacles to implementing AI initiatives within the organisation

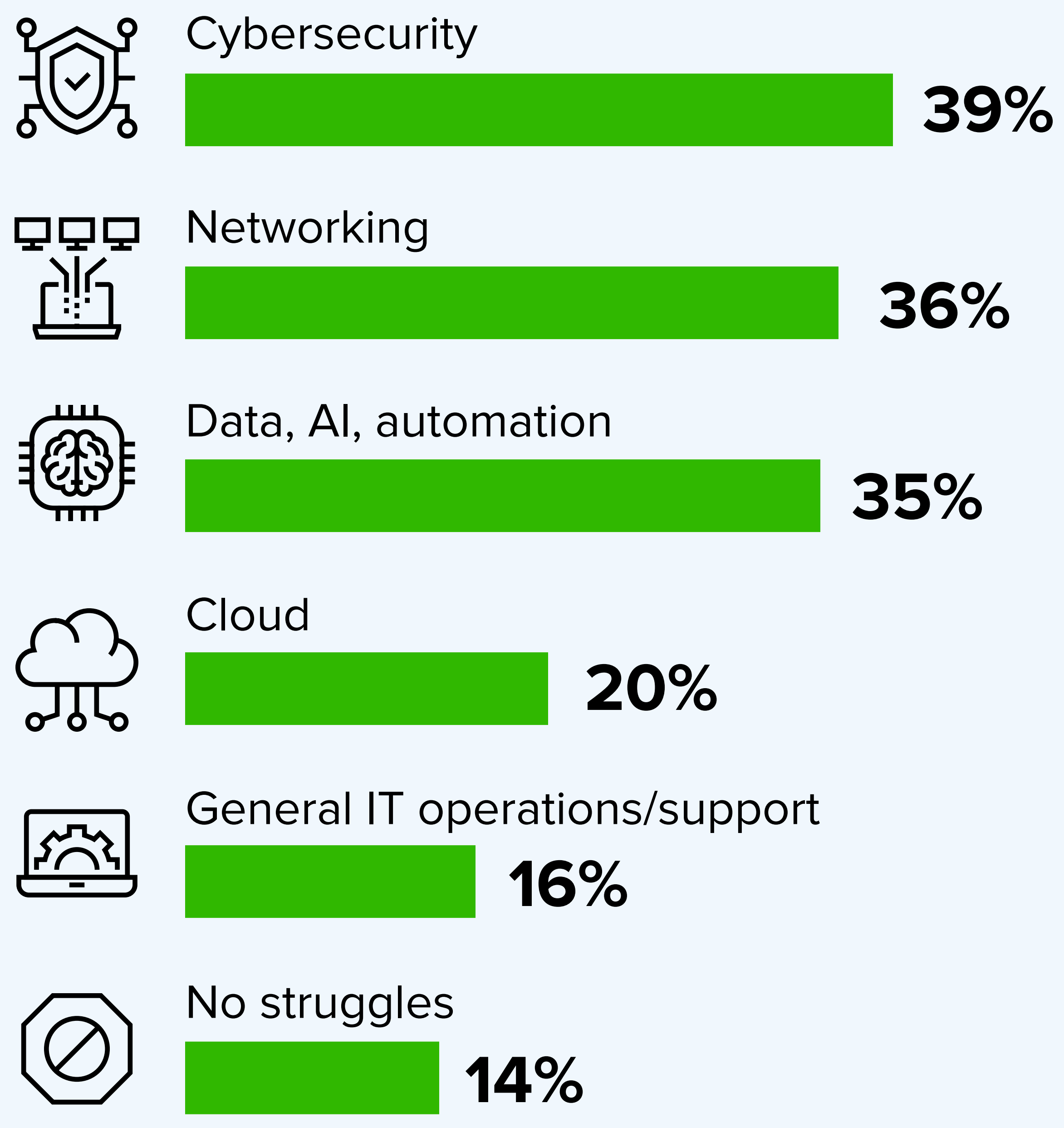
Source: IDC Technology Leaders Survey, March 2024 (N = 650)

The Lack of Skills Compels Global Organisations to Reignite their Talent Acquisition and Reskilling Plans

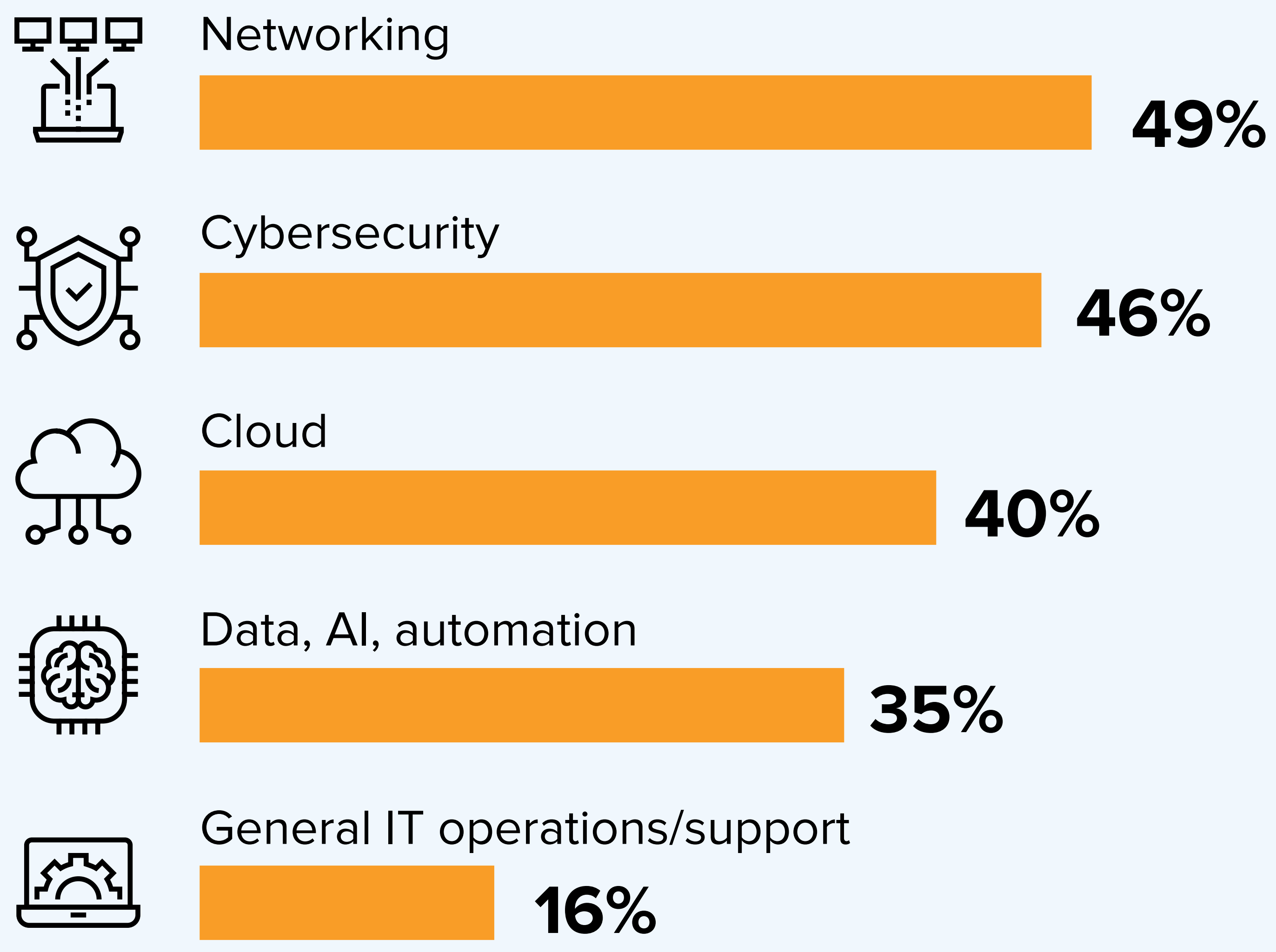
With technology increasingly impacting every industry and function, the digital skills landscape is rapidly evolving. In addition, there is increasing pressure for digital reskilling across all sectors. Cybersecurity skills, networking skills (especially in medium-sized companies) and data/AI/automation skills (especially in large and very large organisations) are highly demanded but difficult to find across the globe.

Technology partners play a key role in filling the existing digital skills gap, supporting reskilling initiatives, and driving adoption of cybersecurity and networking management and modernisation solutions/services.

Businesses are struggling to find and retain the following skills within the organisation



Meanwhile, organisations expect to increase their use of external partners, such as vendors or managed service providers, to help bridge skills gaps

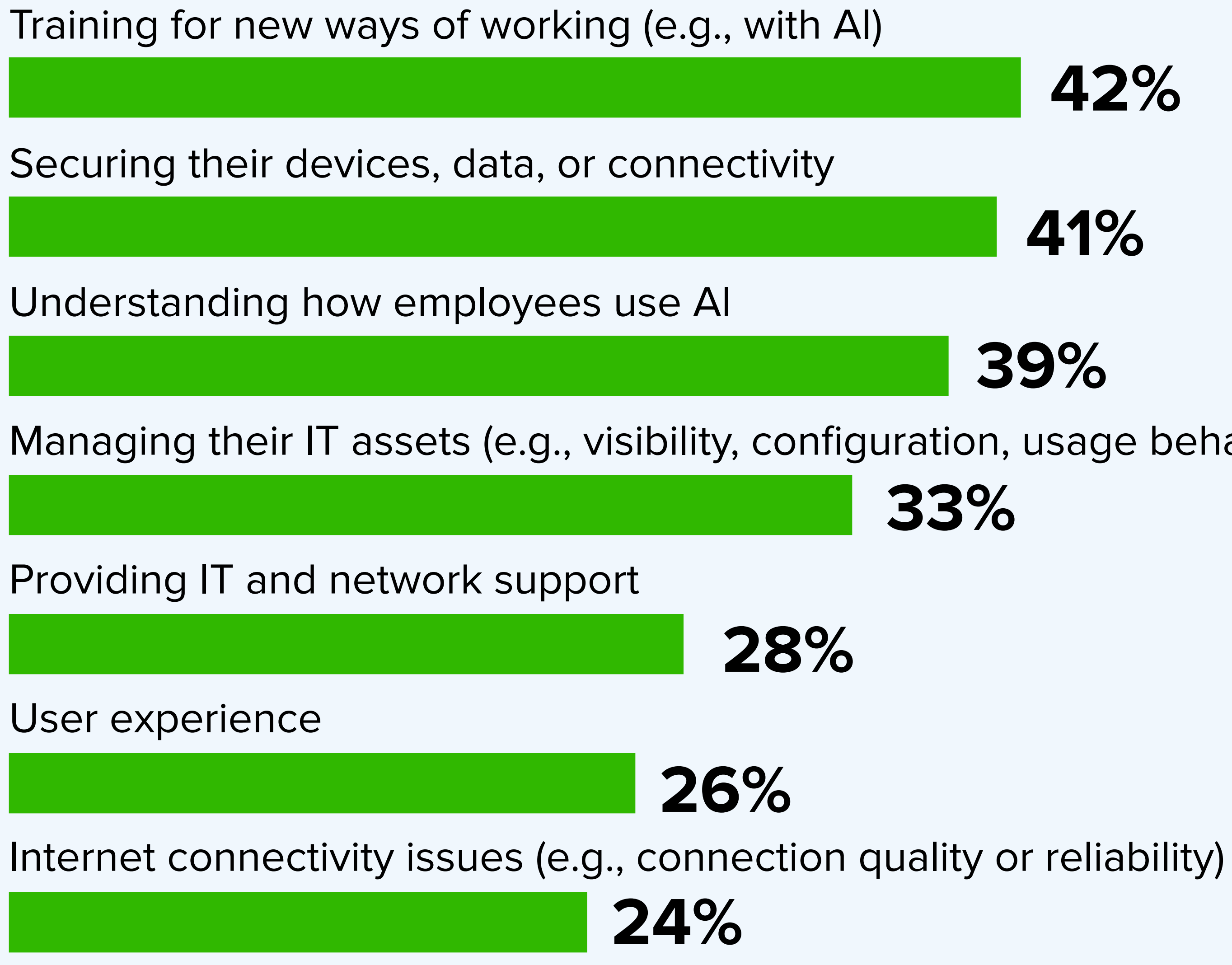


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

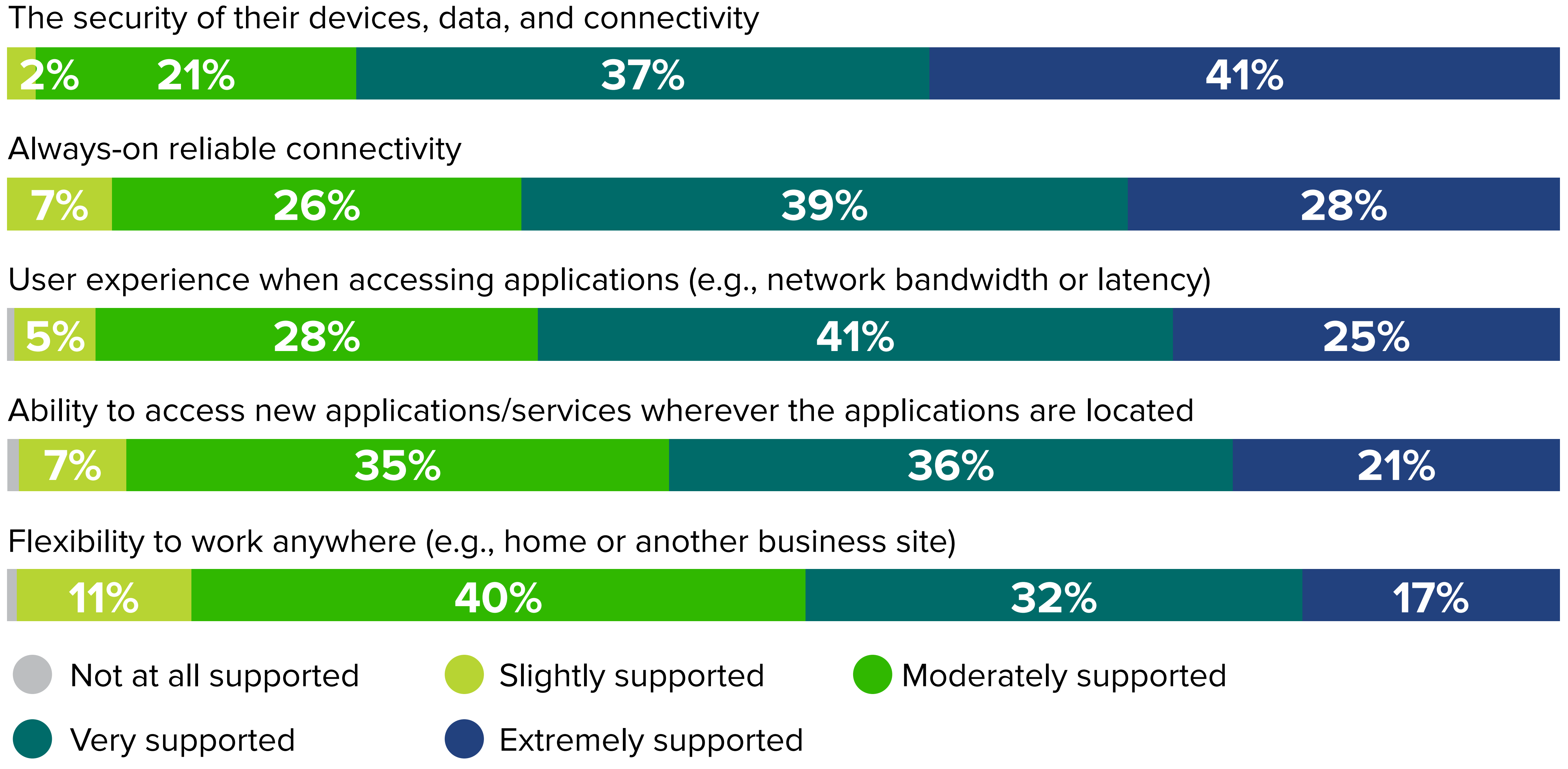
Beyond Talent and Skills Development, Organisations Aim to Adopt New Work Practices and Support Workers Regardless of Location or Digital Setup

The employees of global organisations are well supported in terms of connectivity reliability and device security. However, half of organisations worldwide struggle to support employees adequately with flexible work models and seamless and predictable access to high-performing applications and services.

Biggest IT challenges in supporting remote and hybrid workers



Q: How well are your employees currently supported in the following areas?



The employees of global organisations are more and more dispersed across multiple countries and locations (i.e., through hybrid/flexible working models). As such, the key workforce-related tech challenges facing organisations include: 1) having constant visibility of local network performance, 2) managing tools and devices of remote workers, and 3) providing the right levels of local knowledge and expertise.

To support remote and hybrid workers, organisations aim to provide training on new ways of working (e.g., with AI), secure multiple remote devices (and data), and understand how AI is leveraged for work.

Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Everything Relies on the Network, But Many Networks are Not Ready for the Future

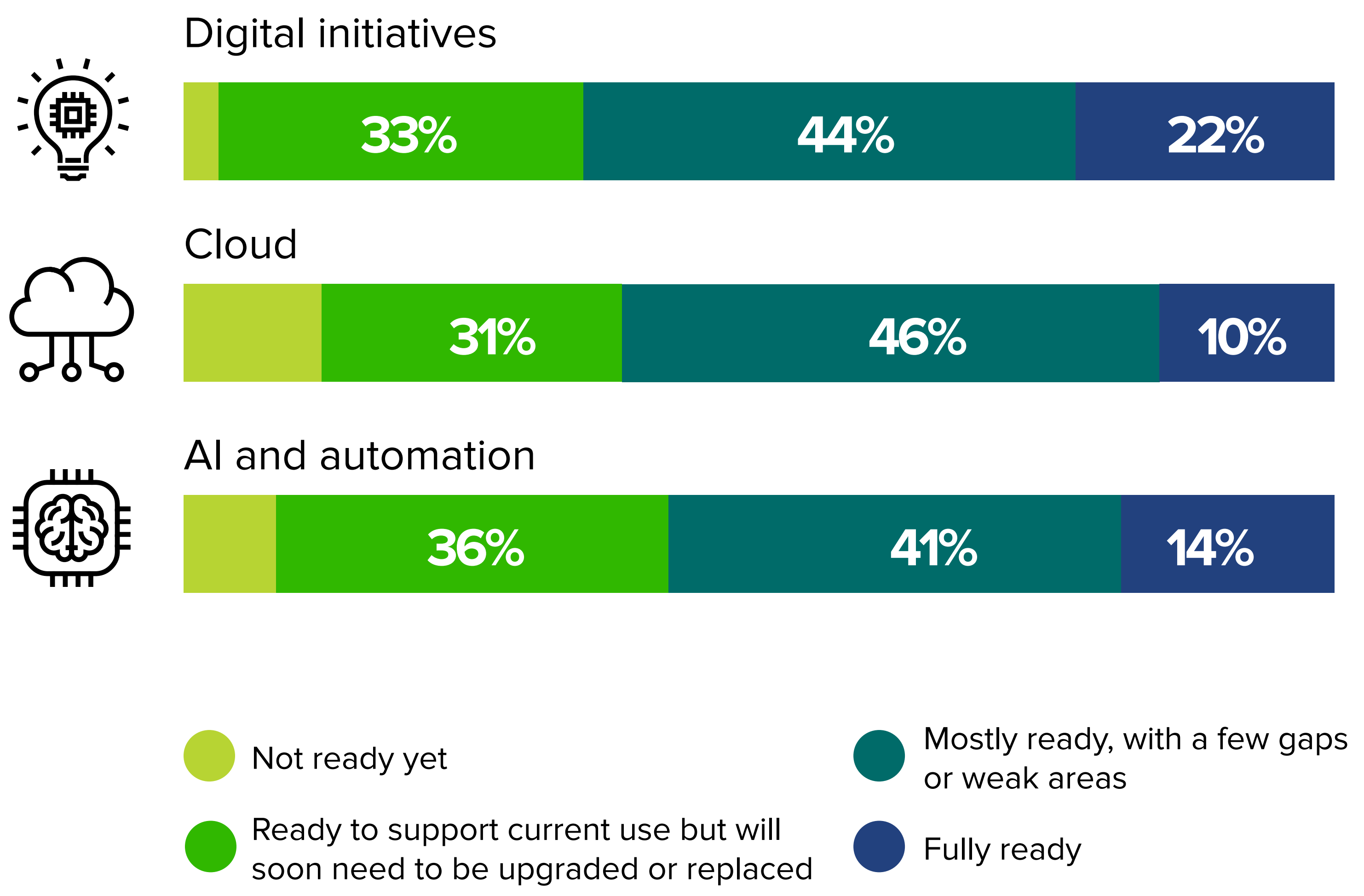
Modern business operations, including AI, cloud, and digital operations, completely rely on resilient and performant network infrastructure. However, only a few companies believe their networks are fully ready to support future needs, and over a third acknowledge that their networks are unfit or will soon need upgrading or replacement.

For example, networks that do not scale flexibly on demand or deliver high application performance hinder companies from implementing large AI projects.

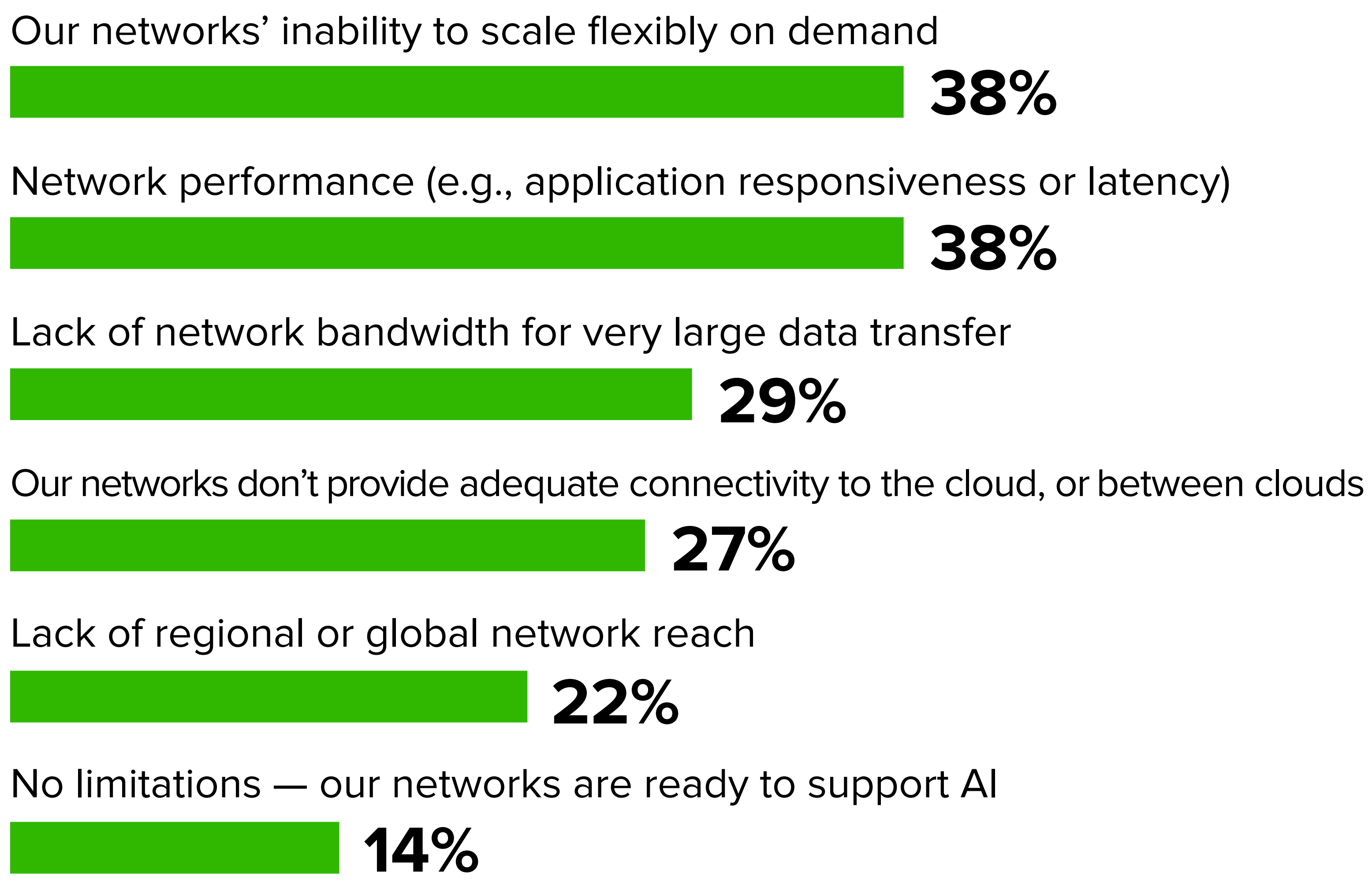
Companies know what they need from their networks to achieve their goals. Specifically, they want service providers to deliver reliable, flexible, and agile networks with visibility/observability features and cloud connectivity.

Ultimately, network performance drives application performance; as such, a flexible, high-performing network is fundamental to a company's ability to grow in a cloud-based digital business environment.

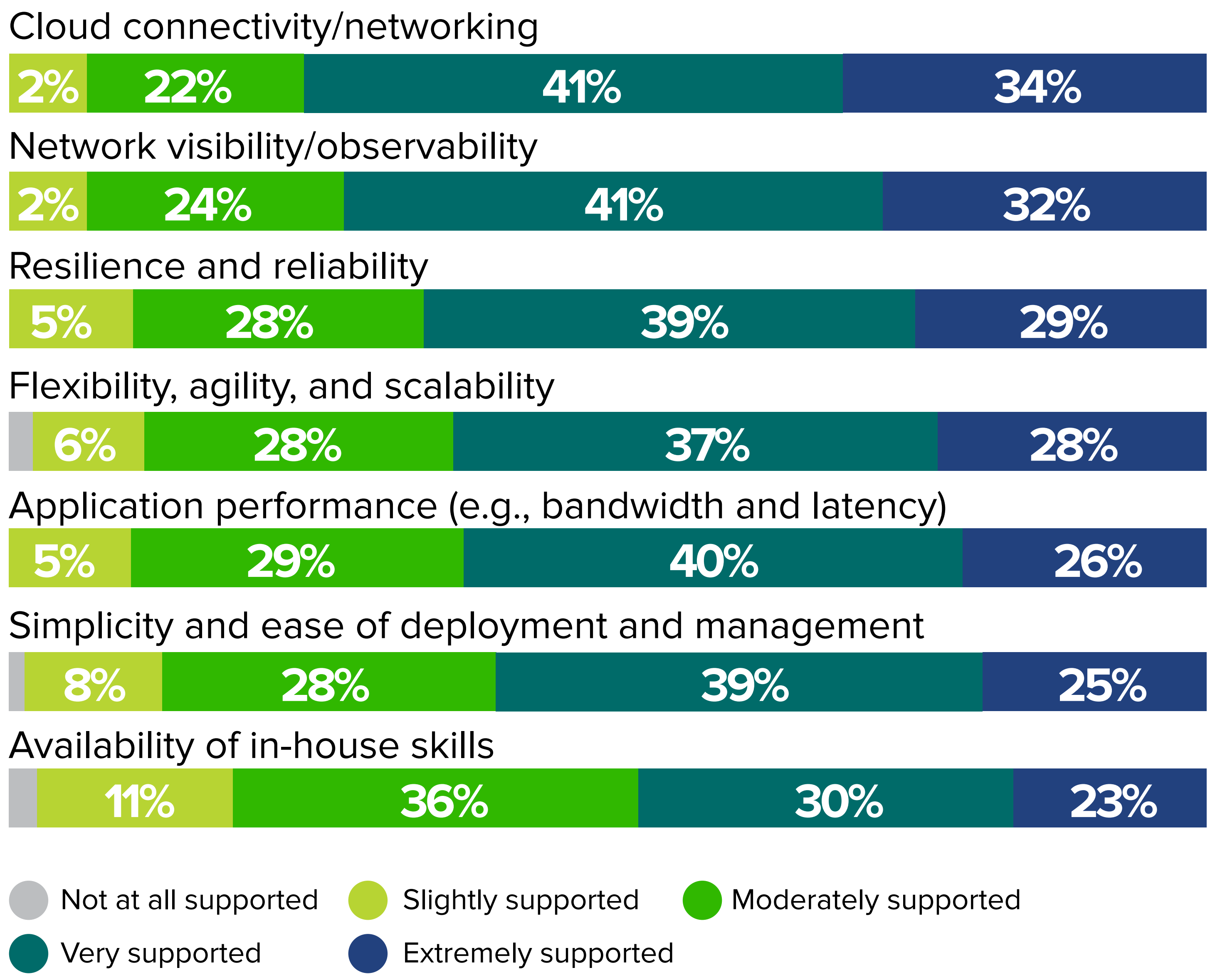
The network infrastructure overall readiness to support organisational success over the next 12 months



Several factors prevent or limit organisations' networks from supporting large data/AI projects:



Several aspects of networking/connectivity are important in helping organisations achieve their goals:



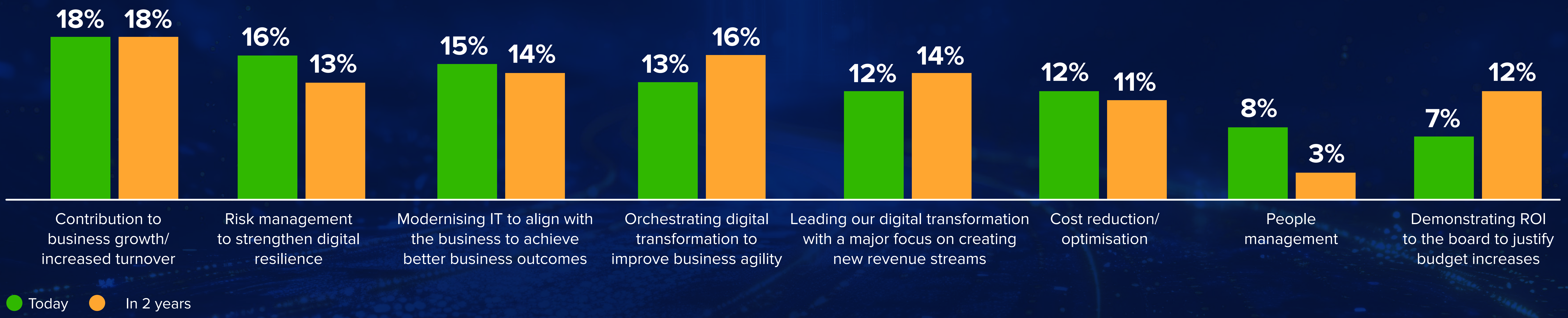
Technology Leaders are Called to Step Up and Become Digital Business Leaders

Due to the fast pace of innovation and the increasing role of business units in influencing or directly driving technology spending, the responsibilities of CIOs — and more generally technology leaders — are changing. According to the IDC Worldwide IT Spending Guide: Line of Business survey, 54% of worldwide IT spending is driven by business units.

To enable a fully-digital business, CEOs are more and more involved in digital initiative decisions (70% of survey respondents highlighted that CEOs lead their organisations' digital initiatives, alongside or with the help of technology leaders). At the same time, new specialised technology leader roles are increasingly common (e.g. CISO, Chief Digital Officer, Chief AI Officer).

In this evolving scenario, technology leaders are expected to contribute to business growth, manage risk by strengthening digital resilience, and modernise IT to achieve better business outcomes. The priorities of technology leaders will largely remain the same in coming years, even if they are expected to be more involved in orchestrating and leading digital transformation efforts centred on business agility improvement and generation of new revenue streams.

Q: Which of the following is your technology leaders' top priority for your organisation today? And what will that priority be two years from now?



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Technology Leaders Harnessing the AI Momentum for a Further Digital Maturity Leap

Technology leaders eager to become digital business leaders and boost their organisations' digital maturity level need to:

- Connect more and more with business leaders to prove the digital ROI and business impact contribution of AI.
- Think of how AI can enable efficiencies and help team members do their jobs better (instead of worrying about AI-driven replacements).
- Develop a digital regulations radar to keep track of emerging regulations and anticipate their impact on the organisation and team.
- Chart out a multi-horizon digital business road map focused on AI, talent and skills, networks, and solid infrastructure backbones.
- Address their network and ensure it's ready to support the rapid growth of data and AI applications, and fully connected to the cloud providers that will support that growth.
- Assess current technology partners and prioritise those able to support their digital business and AI journeys.
- Work with rest of the C-suite — and the chief AI officer, if in place — to enable responsible and ethical adoption of AI with the human kept at the centre.

Source: IDC Technology Leaders Survey, March 2024 (N = 650)

About the Analysts

James Eibisch,

Research Director, European Enterprise Communications Services

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Senior Research Director, MacroTech, Digital Business, and Future of Work

James Eibisch manages IDC's European Enterprise Communications Services research programme. In this role, he helps communication service providers understand the changing nature of the enterprise market in Europe and the evolving competitive service provider landscape. The programme covers enterprise network services, fixed voice, and communication platform as-a-service (CPaaS). Within that, James' own focus areas include cloud/multicloud network services and SD-WAN.

Andrea Siviero leads IDC's European Digital Business and Future of Work Research group. The group provides market research insights to foster a purposeful and fair adoption of technologies supporting digital societies, businesses, and workforces, and to empower tech providers in strategic decision-making, planning, and go-to-market activities. Siviero also co-leads the IDC Worldwide MacroTech Research programme, which focuses on the intertwined connection between the economic and digital worlds—analysing the impact key macroeconomic factors have on the digital landscape and, conversely, how technologies are impacting economies around the world.

More about James Eibisch

More about Andrea Siviero

Message from the Sponsor

Today's successful enterprise CIOs are a new breed, moving beyond the traditional role of technology leader to become a digital business leader, working shoulder-to-shoulder with the CEO.

And while they continue to face a barrage of macroeconomic, geopolitical and environmental headwinds, they're excited about the opportunity to contribute to long-term growth.

With responsibility for boosting the digital maturity of the enterprise, CIOs in 2024 must combine the right technology and network investments with a proactive approach to shifting mindsets internally.

Partnering wisely is critical, so choose a digital-first partner with invaluable local market knowledge combined with the global innovation capability and delivery heft that will enable the organisation to adapt and thrive in today's hyper-connected world. Couple this with an agile, reliable network and you can fast-track growth in 2024 and beyond.

To learn more about how Expereo helps global enterprises drive their long-term growth, please visit our website, www.expereo.com.

Learn more

Ben Elmes
CEO, Expereo

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With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives.

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Enterprise Horizons 2024

Technology Leaders' Priorities on Their Digital Business Journey

An IDC Resource Map

Resource: Technology Leaders Survey, March 2024
Publication date: April 2024, #EUR252049924
Sponsored by: Expereo

Navigating this Resource Map

- Methodology & Demographics
- Resource Map: Analysis

Methodology & Demographics

Methodology & Demographics

Survey Objectives

To understand how tech leaders across Europe, the United States, and parts of Asia see their:

- Priorities, challenges, and goals Business transformation goals and challenges
- Cloud and networking models, and their impact on user experience
- Skills challenges and Future of Work models

To develop a strong basis for a cohesive campaign narrative through IDC content.

Survey Themes

- Attitudes to business, confidence, and investment levels
- Digital business and transformation
- Cloud and cloud migration
- Automation and AI/ GenAI
- Skills and people
- Employee experience and Future of Work

Survey Design

- 20-minute telephone-based interviews
- Conducted from January to March 2024
- N = 650
- Company size: 500+ employees

Survey Sampling

- Operations in over five countries
- All commercial verticals, excluding the public sector
- IT/telecom/ networking directors and above, with decision-making power in the organization

The survey sample comprised the following subsamples:

United States (n = 250)

Hong Kong (n = 50)

United Kingdom (n = 150)

France (n = 50)

Singapore (n = 50)

Japan (n = 50)

Germany (n = 50)

The Resource Map: Analysis

Executive Summary

Expereo Selected Survey Charts

Executive Summary

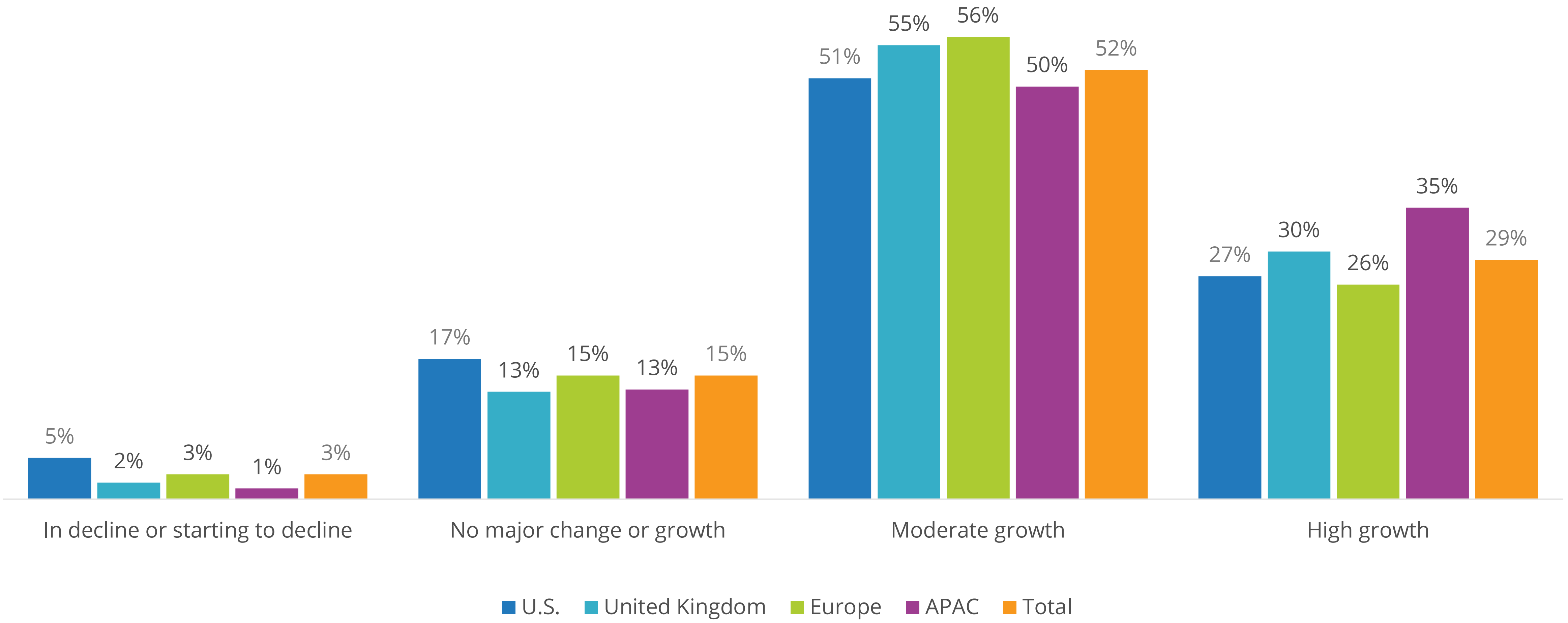
Key Insights from the Custom Survey

- The surveyed global organizations' business expectations for 2024 are characterized by a modest level of optimism, although geopolitical issues, inflation, and economic uncertainty threaten their growth ambitions.
- Innovation, cybersecurity, and efficiency are driving tech investments as companies seek to create growth opportunities, enable resilience, and reduce costs. Although not yet critically important for some, artificial intelligence and machine learning are clear business priorities for organizations.
- The growing sense of AI's importance is matched by the urgency with which companies intend to implement it; this extends to automating business processes and operations. Companies recognize the need for key underpinning technologies (e.g., cloud infrastructure and modern, flexible networks).
- Nearly half the surveyed companies say their networks are not fully ready to support their cloud use; in terms of helping to achieve their business goals, they identified cloud connectivity and network visibility as the most important aspects of networking.
- Cybersecurity, networking, and data-, AI-, and automation-related skills are the most in-demand and difficult-to-find digital skills globally, and external tech partners will play a critical role in bridging organizations' gaps.
- Currently, technology leaders are mainly required to contribute to business growth, risk management, and IT modernization. In two years, expectations regarding digital transformation orchestration and digital revenue generation will be higher.

Business Confidence & Growth

Global organizations' business expectations for 2024 are characterized by a modest level of optimism.

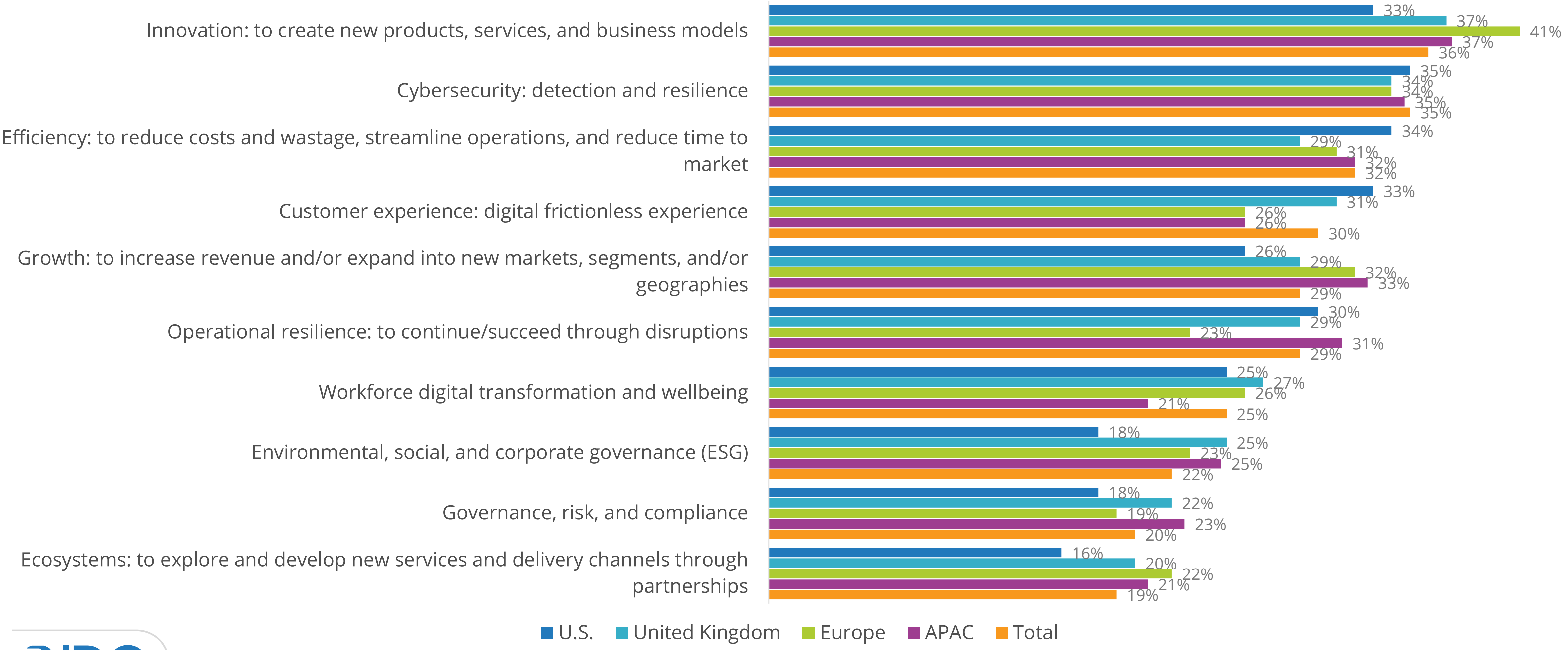
Q: Which of the following best describes the outlook of your overall business for the next 12 months? (% of respondents)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Innovation, cybersecurity, and efficiency are driving tech investments as companies seek to create growth opportunities, enable resilience, and reduce costs.

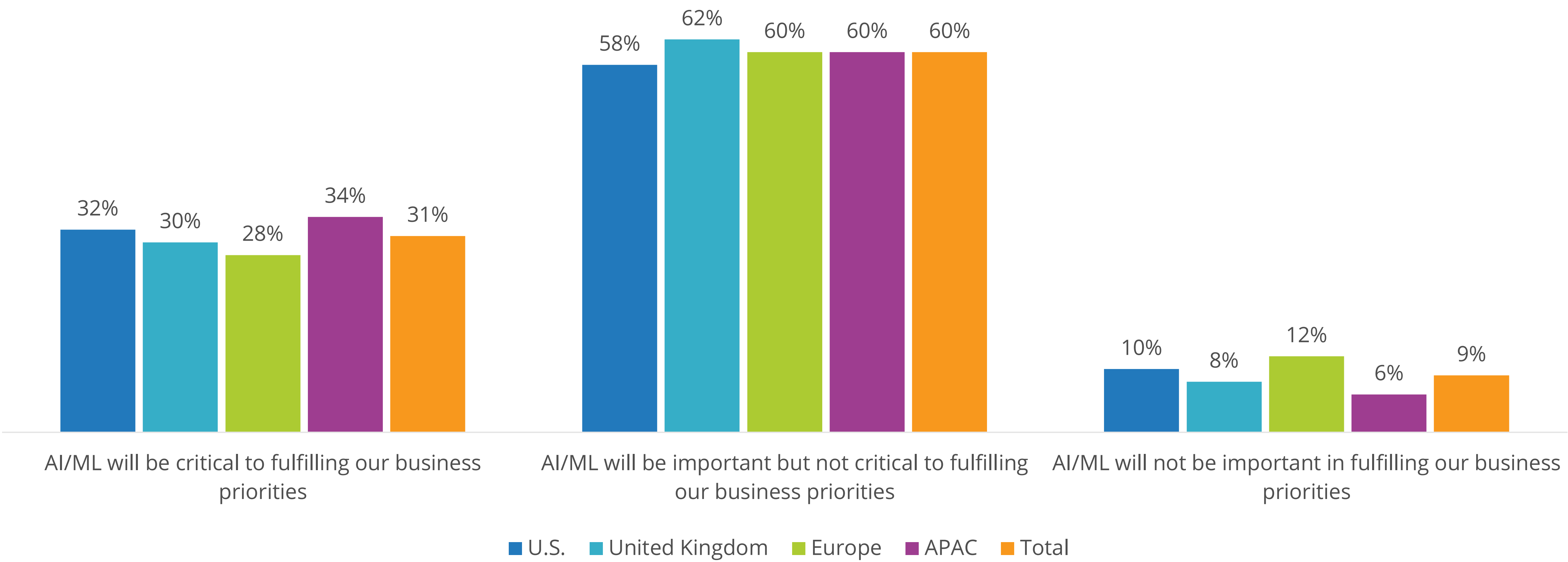
Q: What are the most important business priorities driving technology investments in your organization in the next 12 months? (% of respondents — up to 3 responses)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Although not yet critically important for some, artificial intelligence and machine learning are clear business priorities for organizations.

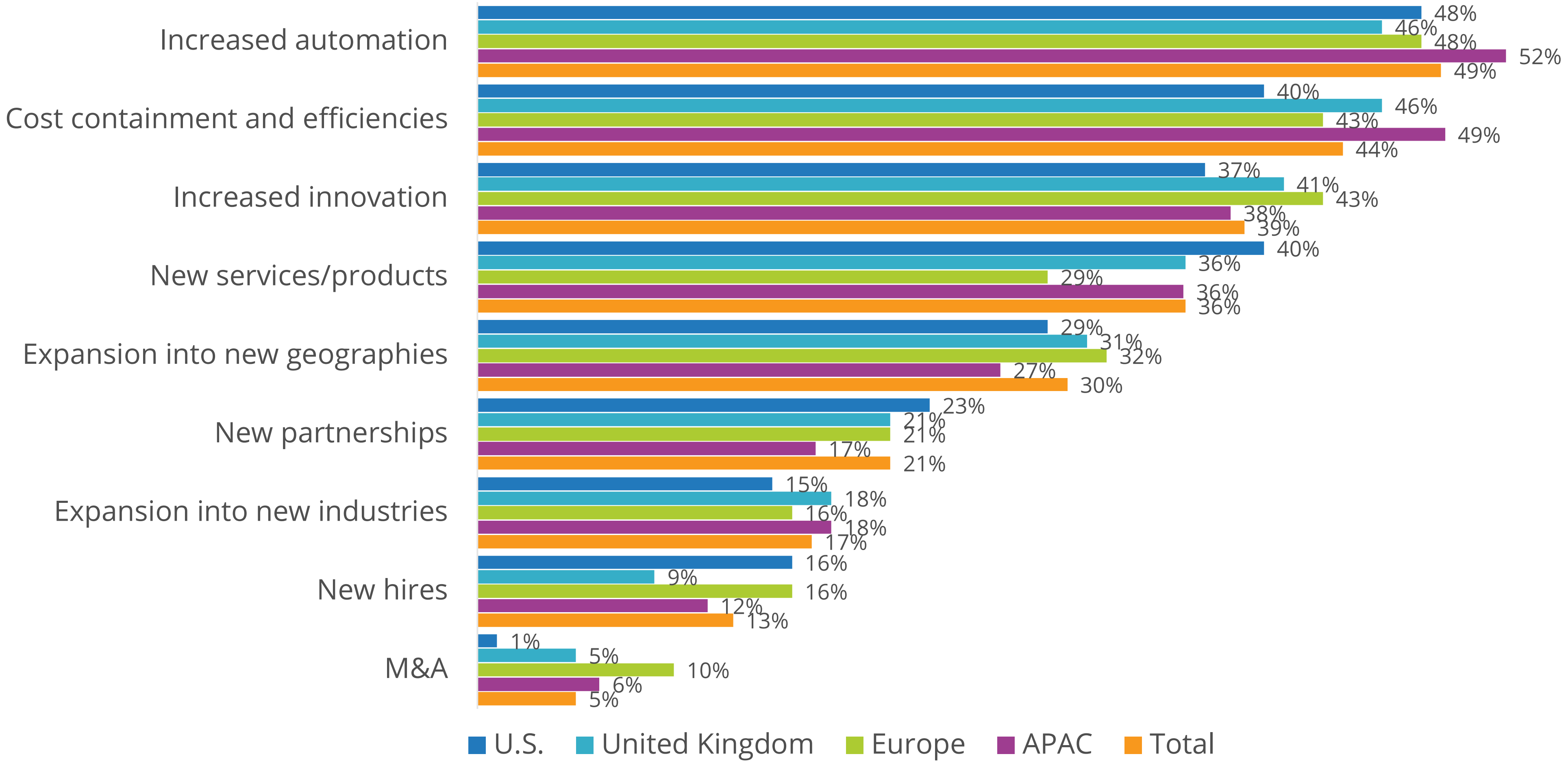
Q: To what extent do you see artificial intelligence (AI) and machine learning (ML) contributing to your business priorities? (% of respondents)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Increased automation, enhanced cost containment and efficiencies, and greater innovation will ignite growth in the next 12 months.

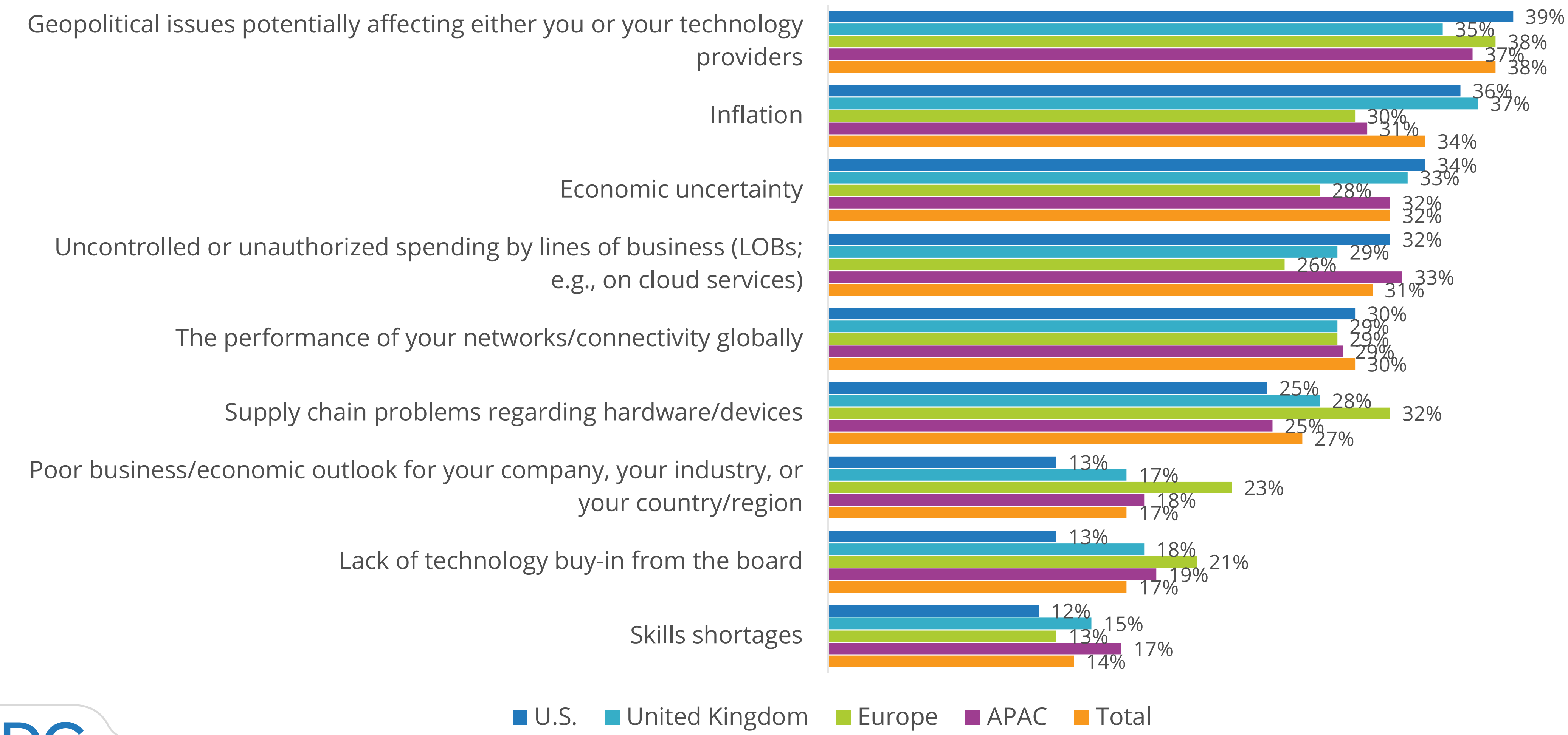
Q: How is your organization planning to deliver global growth in the next 12 months?
(% of respondents — multiple responses)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Geopolitical issues, inflation, and economic uncertainty will continue to threaten global organizations' growth ambitions.

Q: Which of the following are the biggest risks or inhibitors to your growth ambitions over the next 12 months? (% of respondents — up to 3 responses)

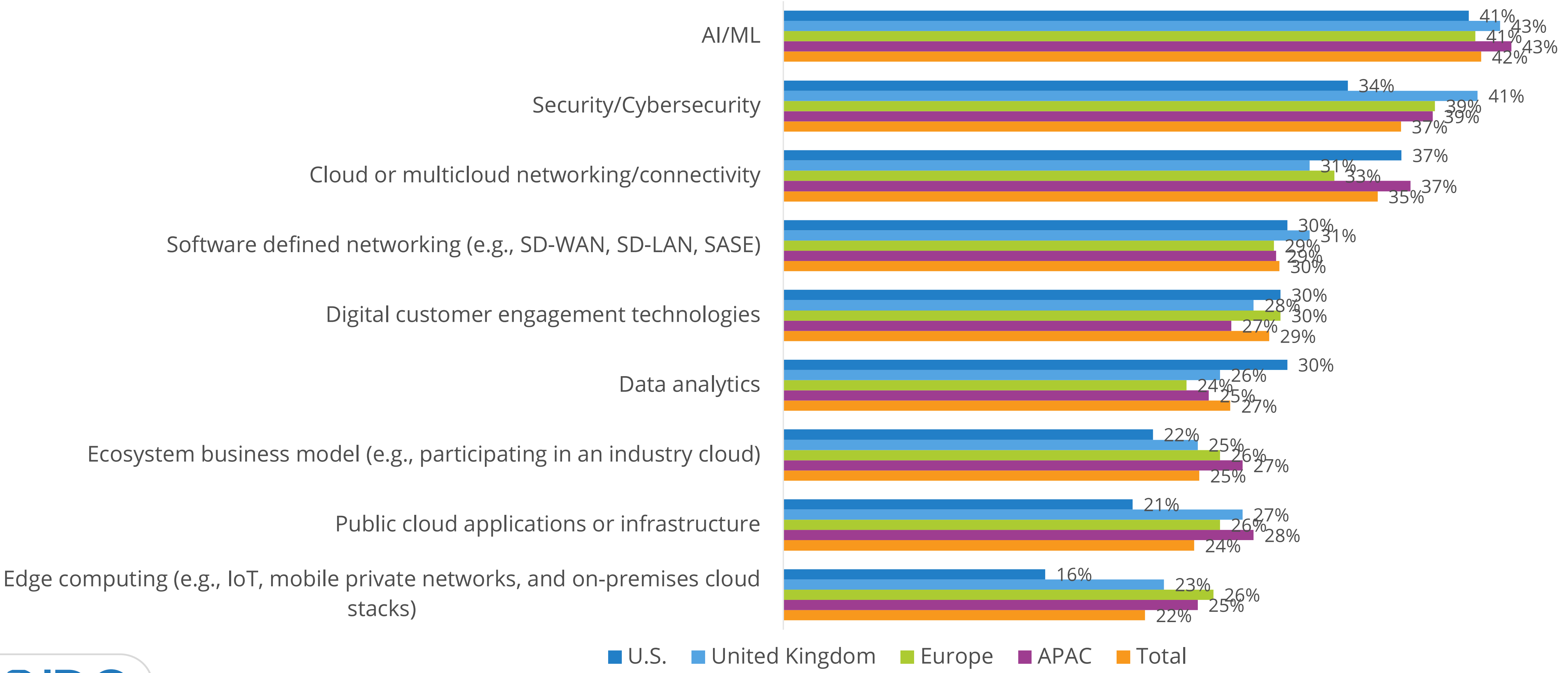


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Artificial Intelligence & Tech Landscape

AI is now the most urgent technology priority across all regions, narrowly beating security. Cloud and software-defined networking are important enablers.

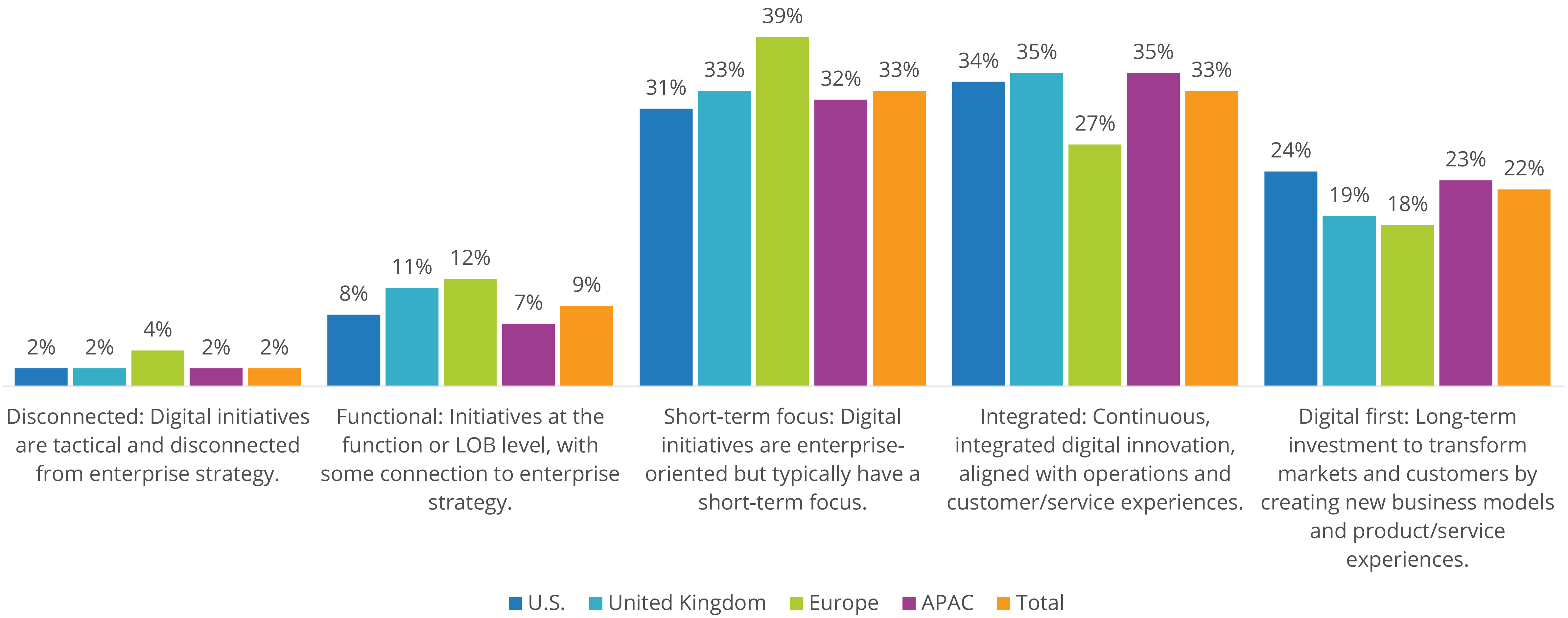
Q: Which of the following technologies will your organization prioritize in terms of effort and/or financial investment over the next 12 months? [Choose all that apply]



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Most companies implement digital initiatives enterprise-wide, with U.S. companies being the most advanced. Nearly a quarter of organizations describe themselves as digital-first.

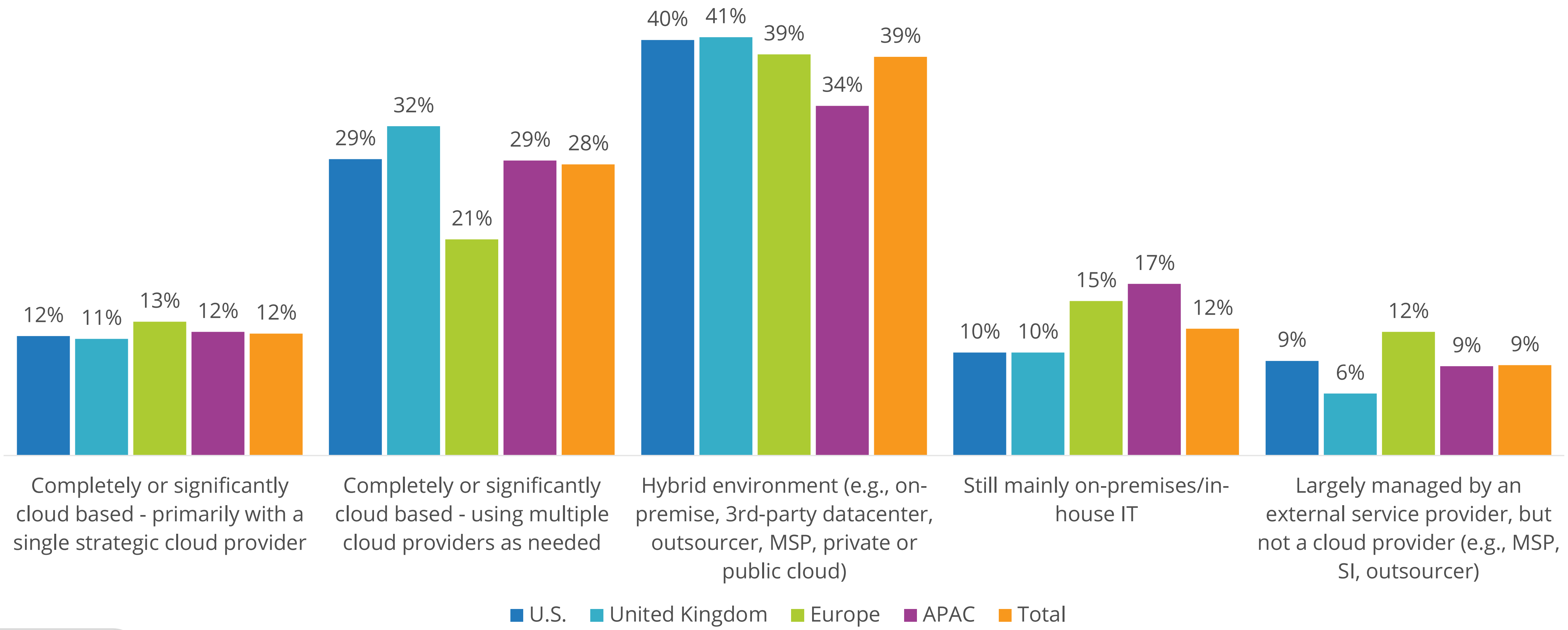
Q: How would you assess your organization's digital strategy and initiatives?



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Within the next year, around 80% of the surveyed companies expect to be mainly cloud-based or to operate in a hybrid IT environment.

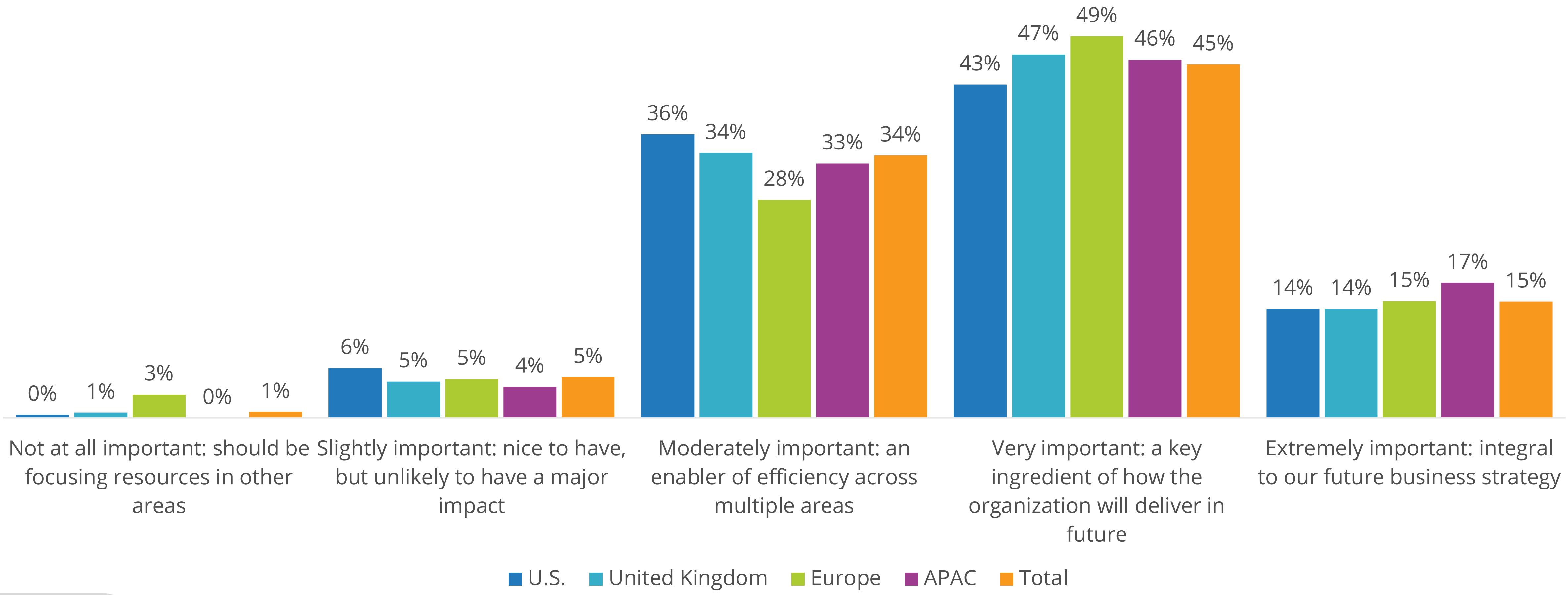
Q: Which of the following best describes how you expect your organization's IT estate to look in 12 months?



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Operational automation is a high priority, which reflects the finding that AI has become the most urgent technology priority. Automation is very or extremely important to 60% of the surveyed organizations across all regions.

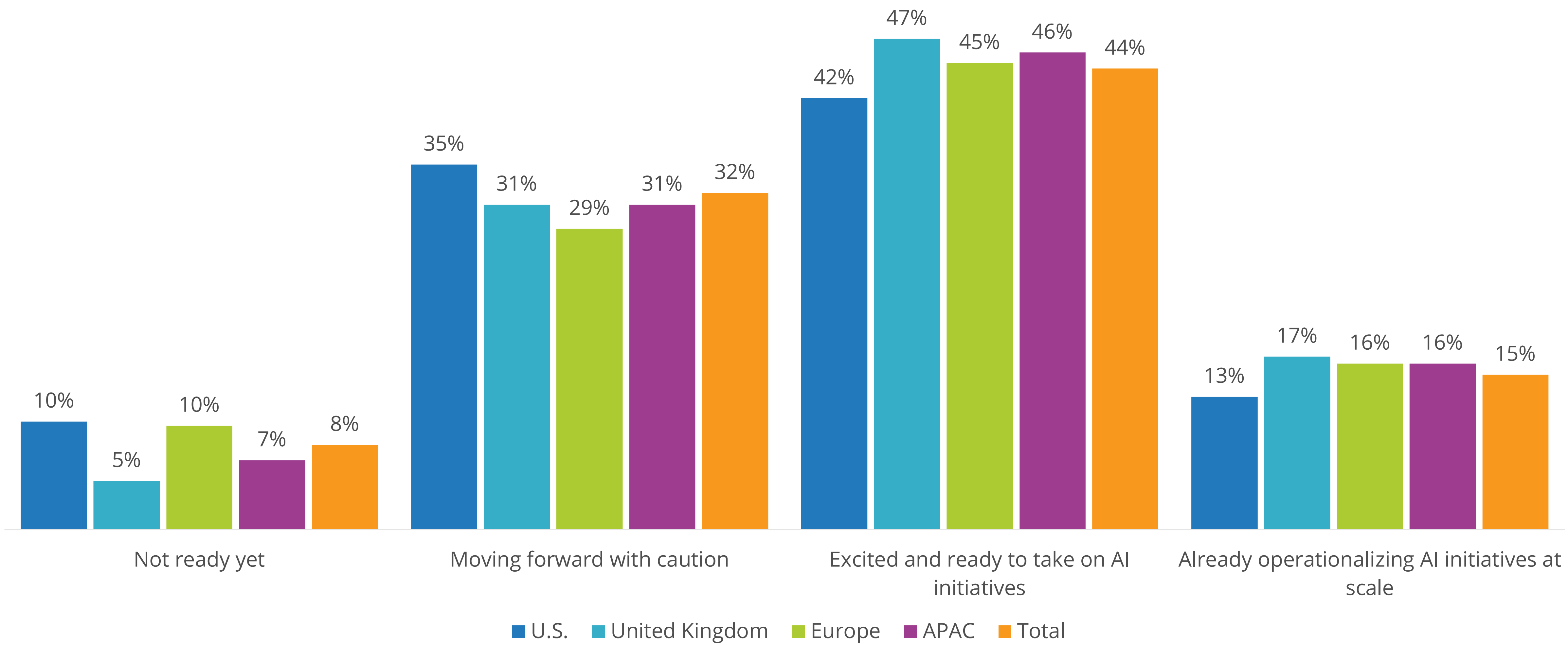
Q: How important to your organization's overall future success is automating your operations and processes?



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Reflecting the high priority enterprises put on AI, most surveyed companies already believe they are ready to develop and implement AI initiatives. Only a tiny minority have not yet started preparing.

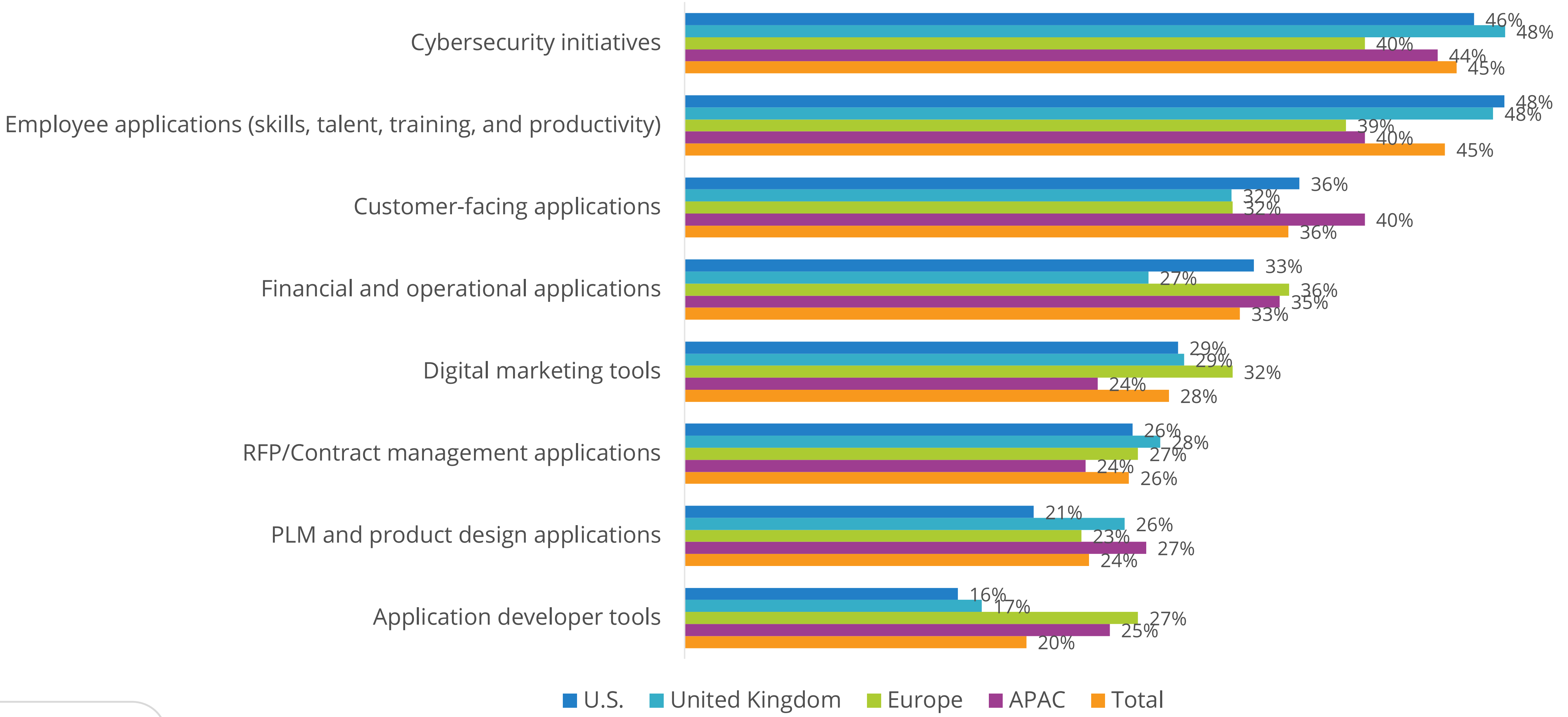
Q: How ready is your organization to take on AI initiatives?



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Around half the surveyed companies are ready to trust aspects of their security to AI, a result of the relative maturity of AI in areas such as anomaly and fraud detection.

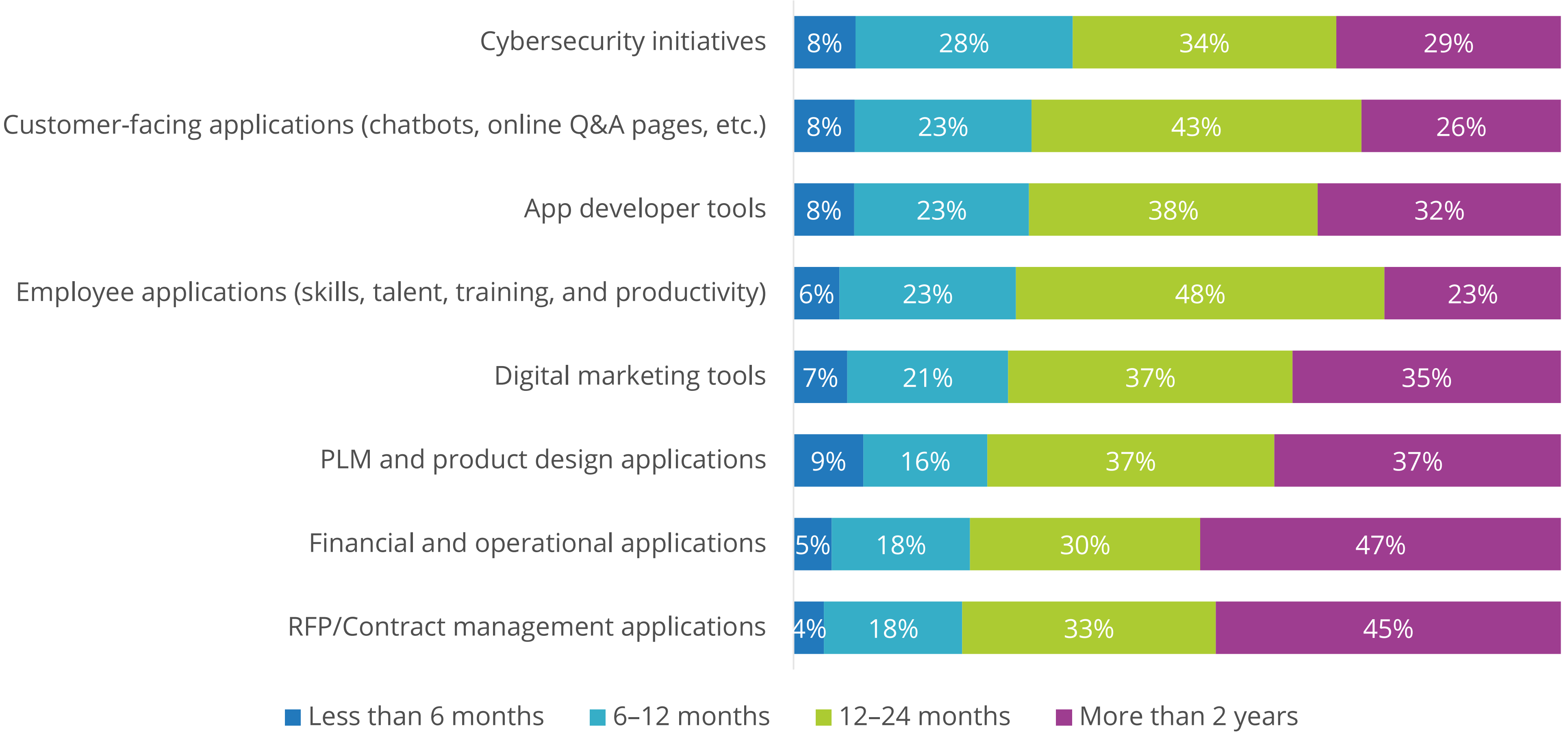
Q: Which of the following AI initiatives will your organization prioritize over the next 2–3 years? [Choose all that apply]



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Among companies that are prioritizing AI in each area, those targeting security are moving the fastest, with over a third expecting to implement AI within the next 12 months.

Q: How long will it be until your organization implements each of these AI initiatives?

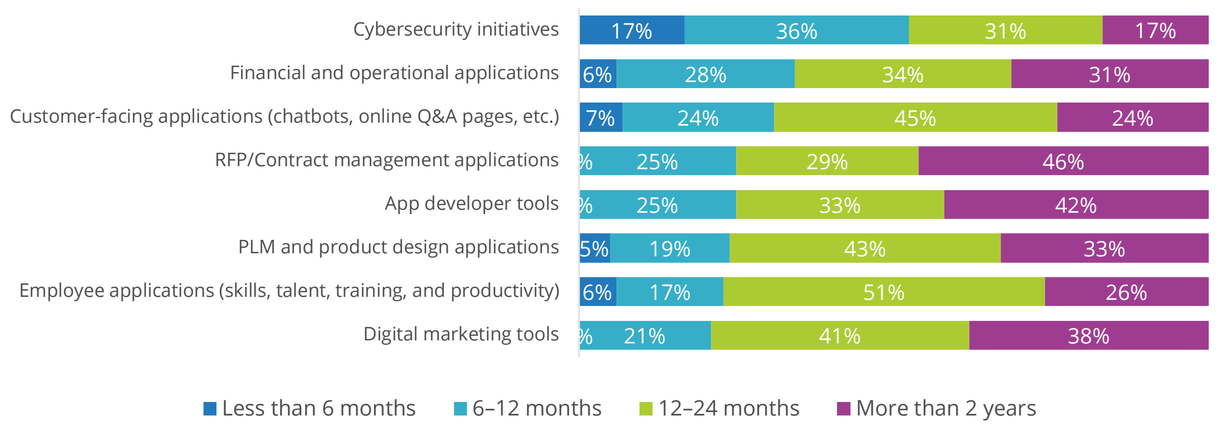


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

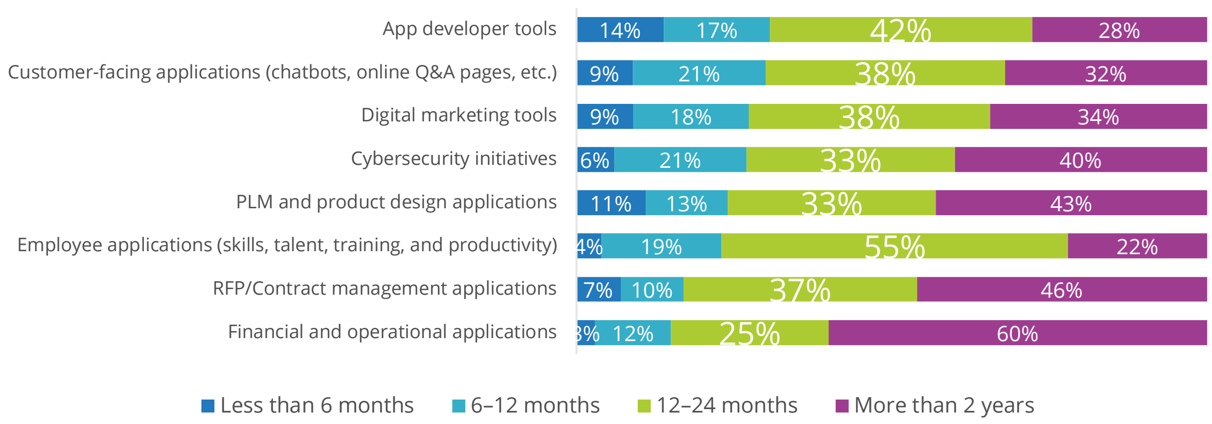
Security-related AI is developing rapidly in Europe and the United Kingdom, but U.S. companies are moving the fastest on AI-enhanced application development tools.

Q: How long will it be until your organization implements each of these AI initiatives?

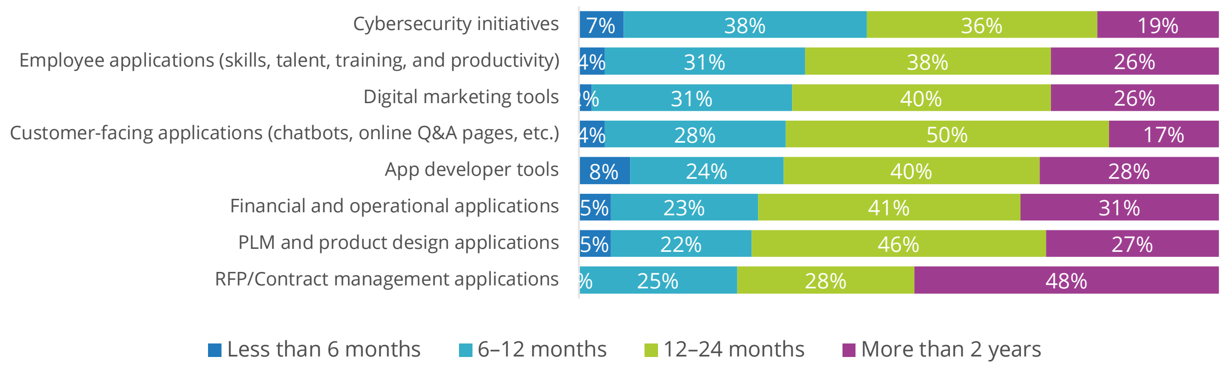
Europe



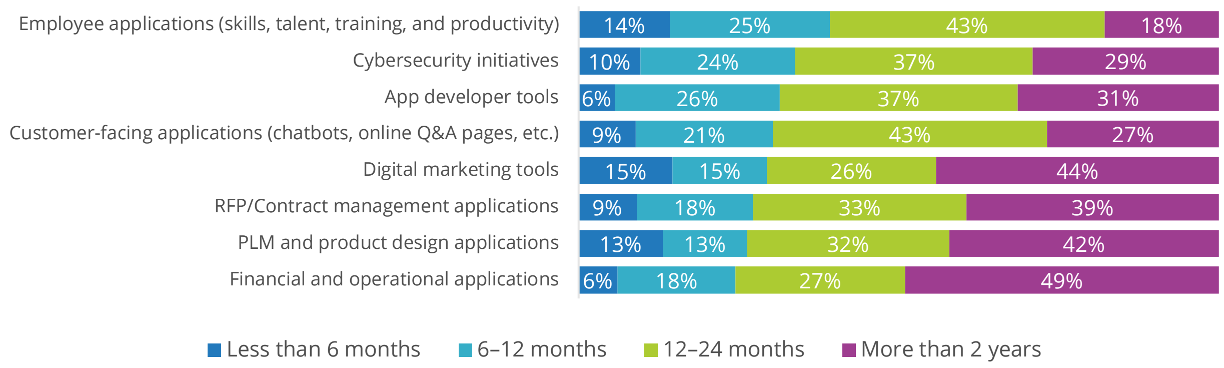
U.S.



United Kingdom



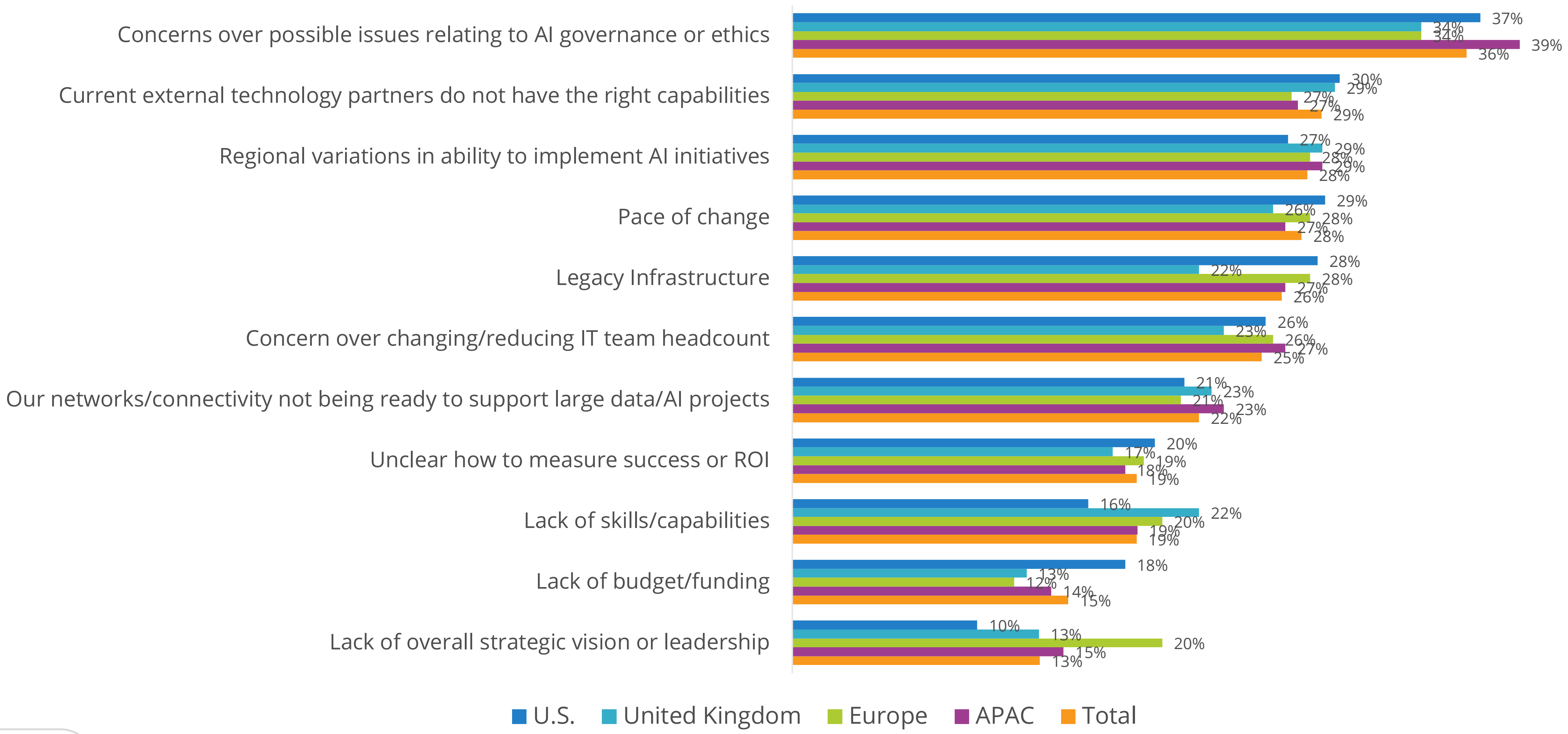
APAC



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Governance/ethics is the leading obstacle to AI implementation in all regions. Industry standards and best practices regarding AI training and usage will reassure companies and enable them to move ahead safely.

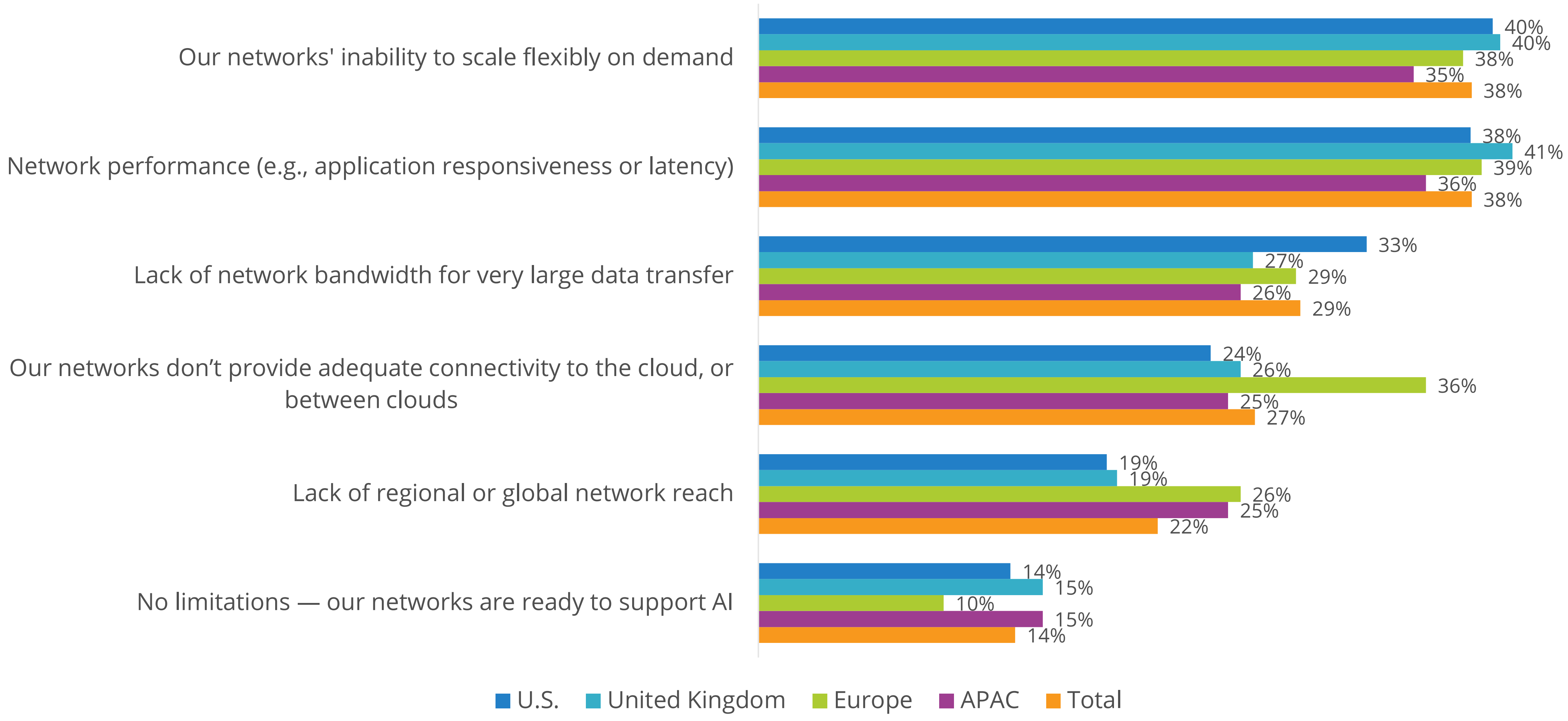
Q: Which of the following are significant obstacles to implementing AI initiatives in your organization? [Choose all that apply]



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Network performance and flexibility are among the key factors preventing companies from implementing AI at scale. Enterprises need networks that can scale on demand to meet variable or unpredictable requirements.

Q: What prevents or limits your organization's networks from supporting large data/AI projects? [Choose all that apply]

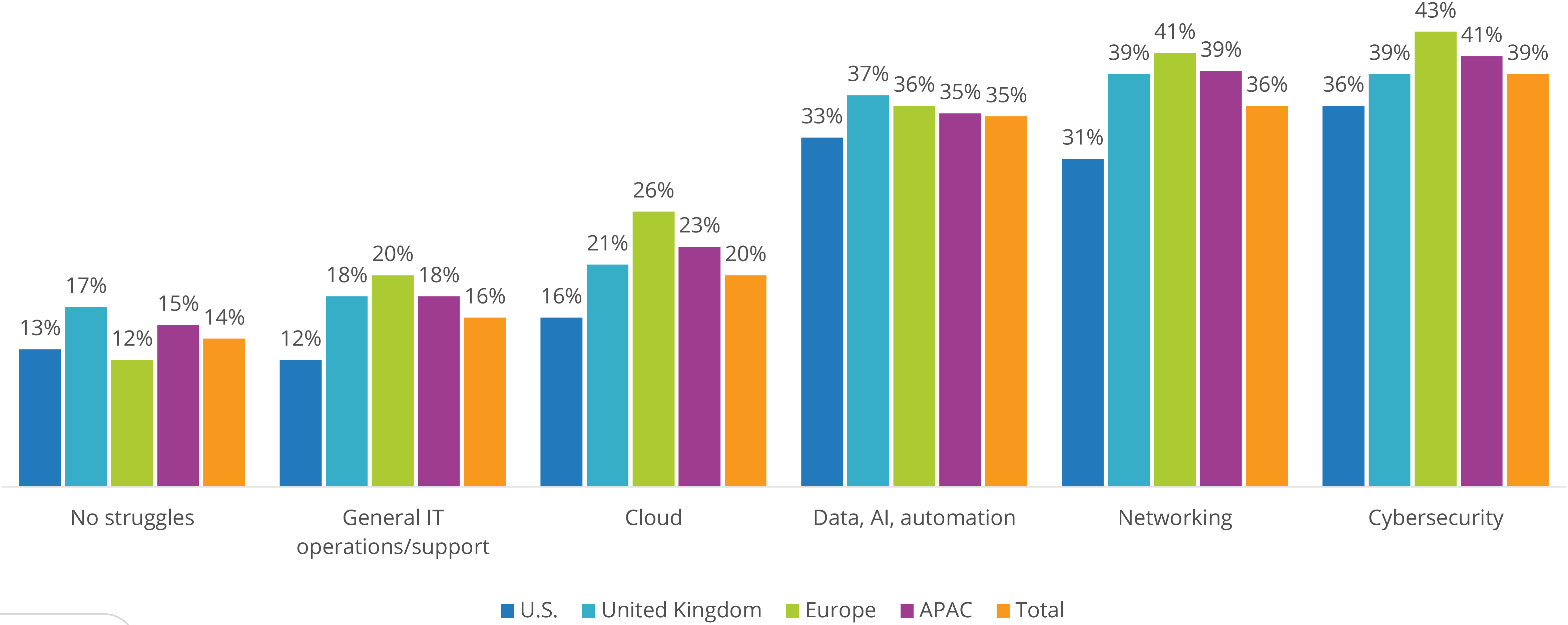


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Talent & Skills

Cybersecurity, networking, and data-, AI-, and automation-related skills are the most in-demand and difficult-to-find digital skills worldwide.

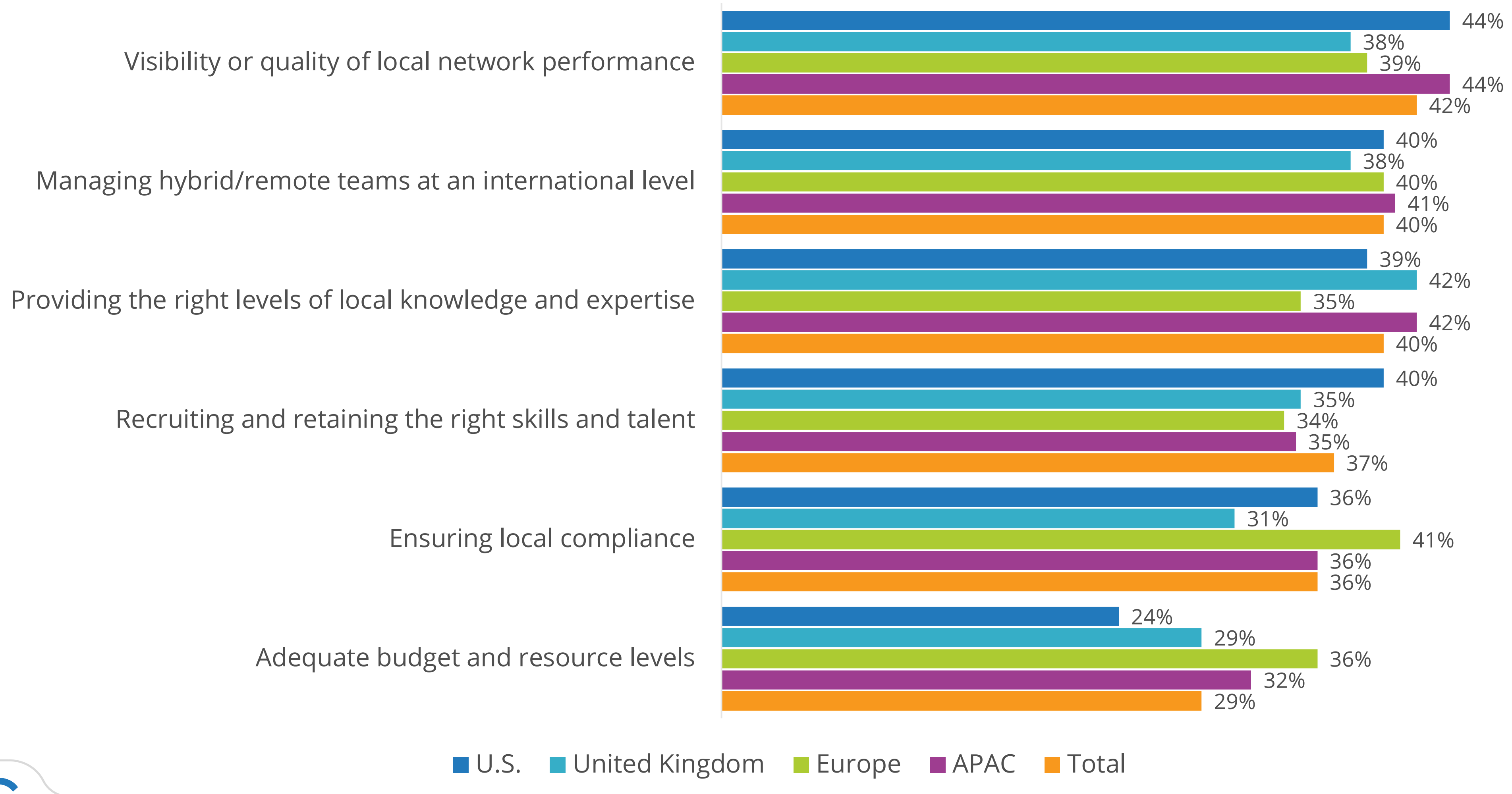
Q: In which areas does your organization struggle to find or retain skills? (% of respondents — multiple choice)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Network performance, hybrid workforce locations, and local knowledge sharing and development are among the key digital challenges when managing teams across locations.

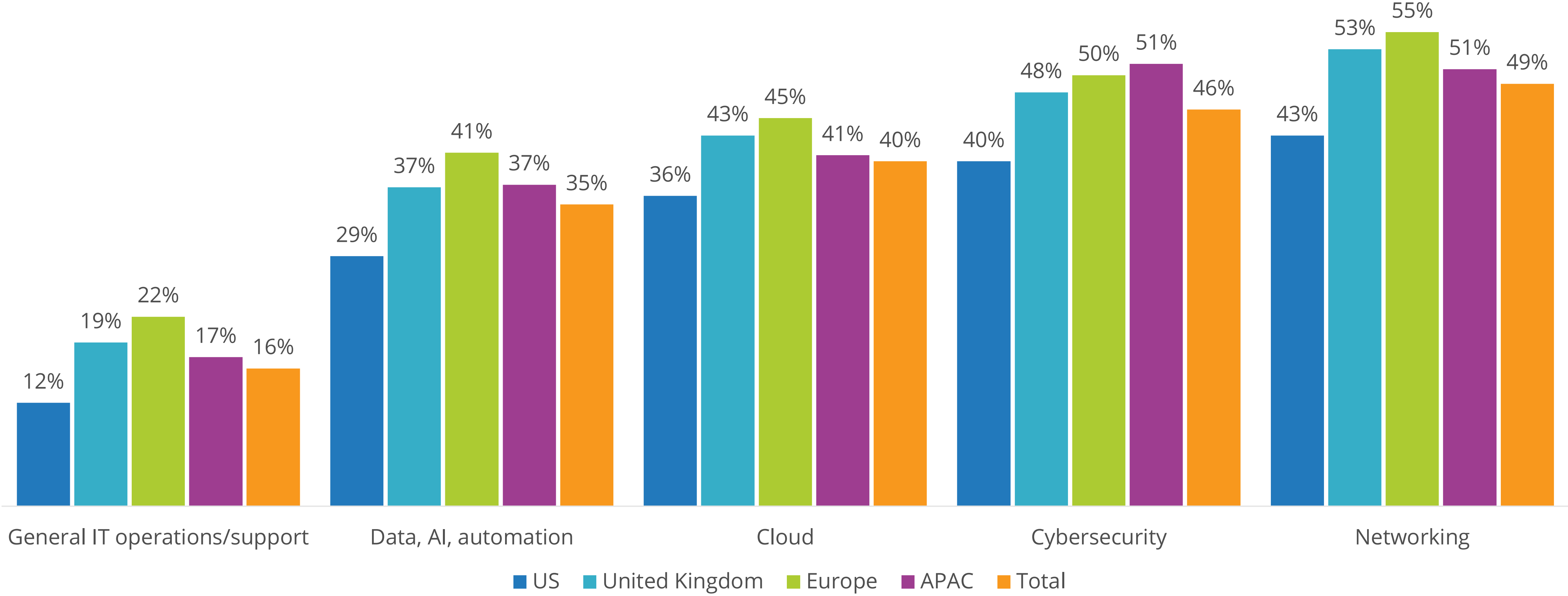
Q: What are your organization's main challenges in ensuring all your technology teams perform well, regardless of location? (% of respondents — multiple choice)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

External tech partners will play a critical role in bridging global organizations' digital gaps, especially those related to networking and cybersecurity.

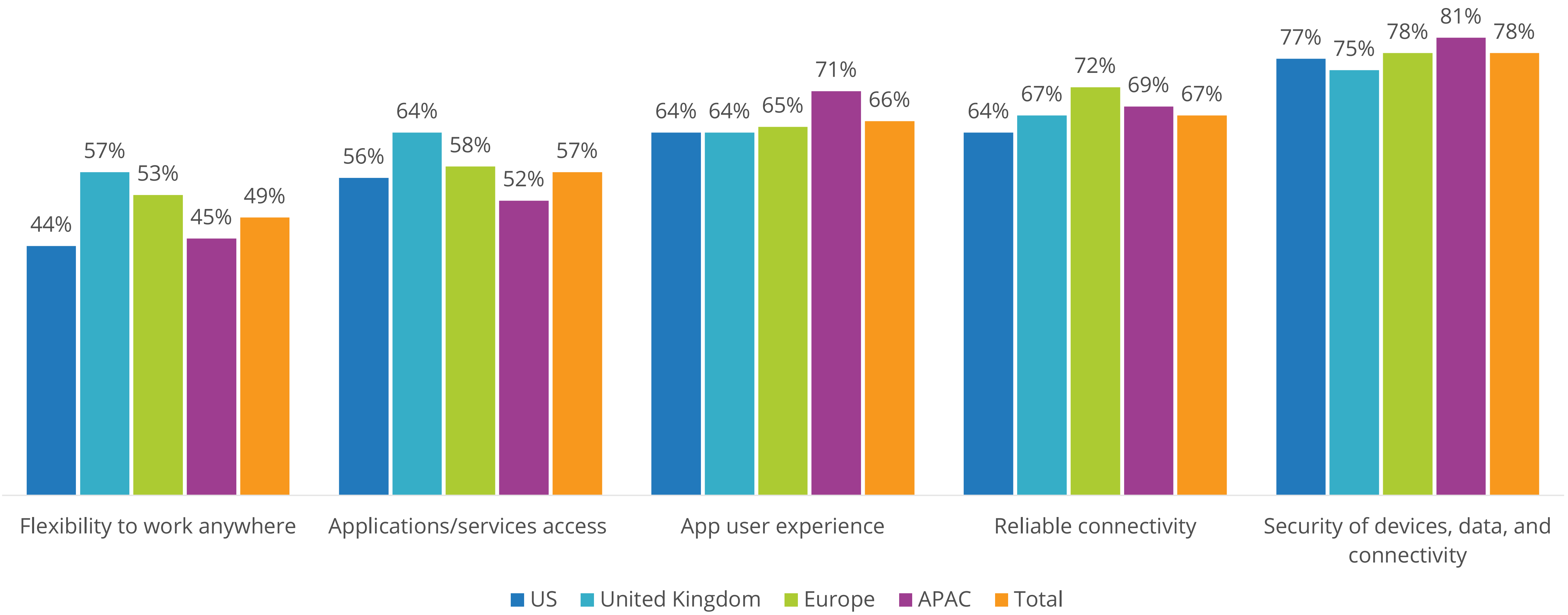
Q: In which areas do you expect to increase your use of external partners, such as vendors or managed service providers, to help bridge skills gaps? (% of respondents — multiple choice)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Half of the surveyed organizations worldwide struggle to support employees adequately with the flexibility to work anywhere and seamless access to applications and services.

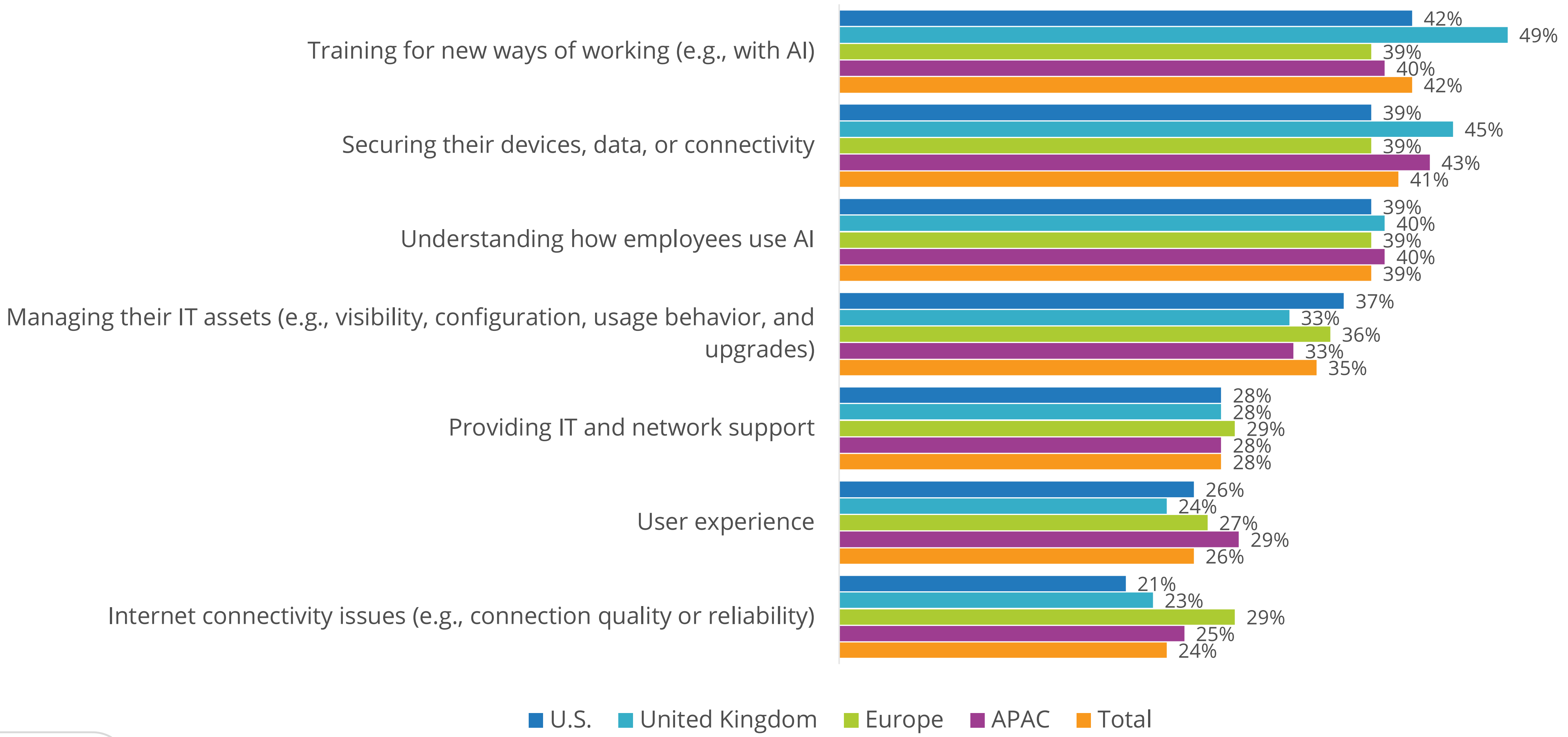
Q: How well are your employees currently supported in the following areas? (% of respondents selecting "Very Supported" and "Extremely" Supported")



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Organizations urgently need to enhance employee reskilling/training and digital tool security and deepen their understanding of AI application use to support remote and hybrid workers efficiently.

Q: What are your biggest IT challenges in supporting remote and hybrid workers? (% of respondents — choose up to 3)

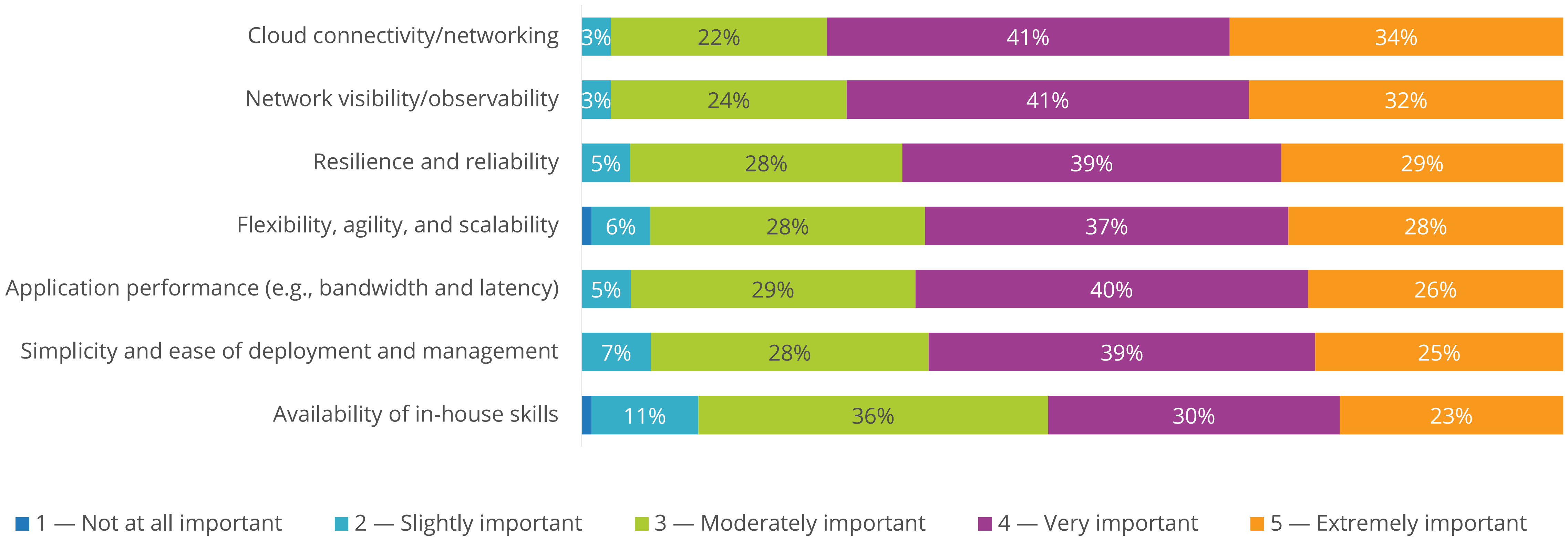


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Network & Connectivity

Organizations consider cloud connectivity to be the most important aspect of networking, as it supports overall cloud usage and migration as well as expanding, high-priority AI and automation initiatives.

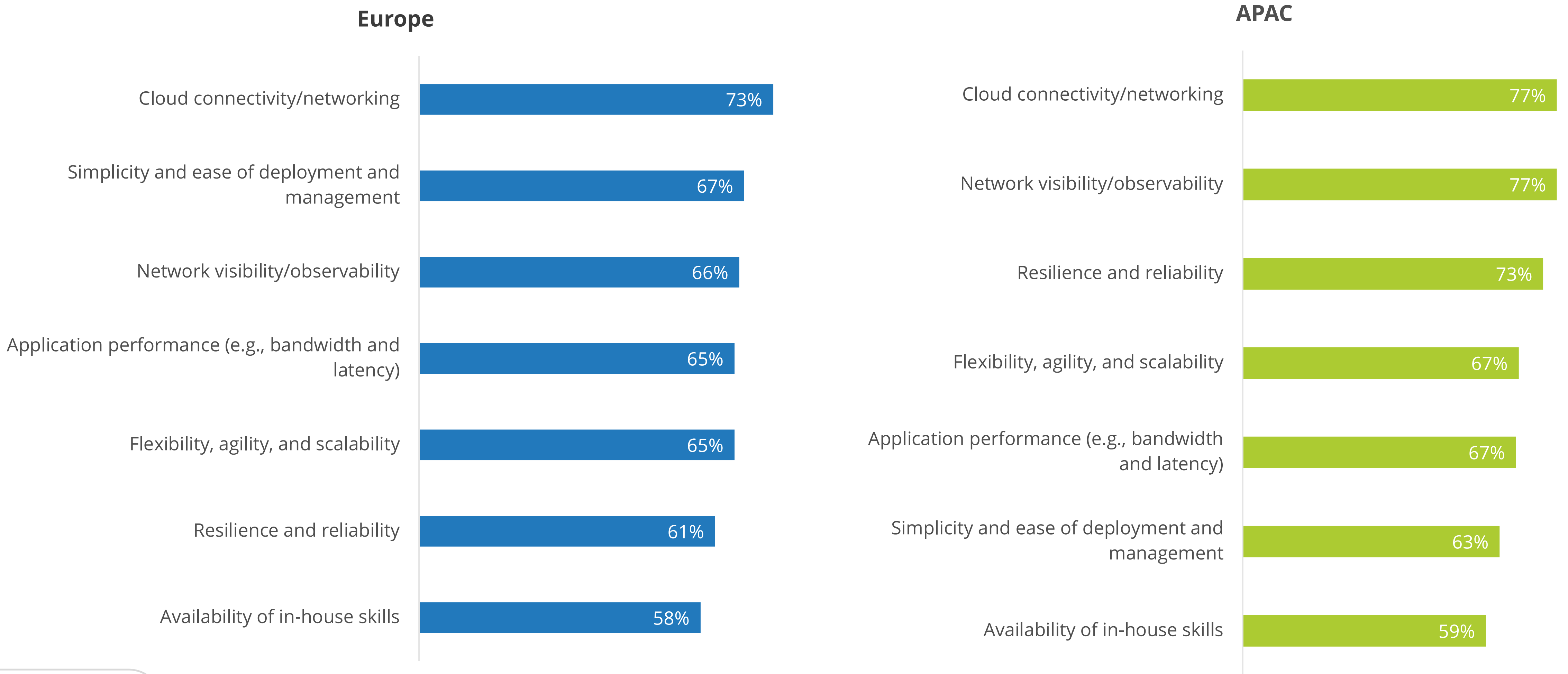
Q: How important is each of the following aspects of networking/connectivity in helping your organization achieve its goals? Please rate each option on a 1–5 scale.



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Cloud connectivity is the most important aspect of networking for organizations across regions. Network visibility is another critical element in managing increasingly complex cloud and multicloud-centric networks.

Q: How important is each of the following aspects of networking/connectivity in helping your organization achieve its goals? Please rate each option on a 1–5 scale. (Figures show the proportion of respondents rating each option as very or extremely important.)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

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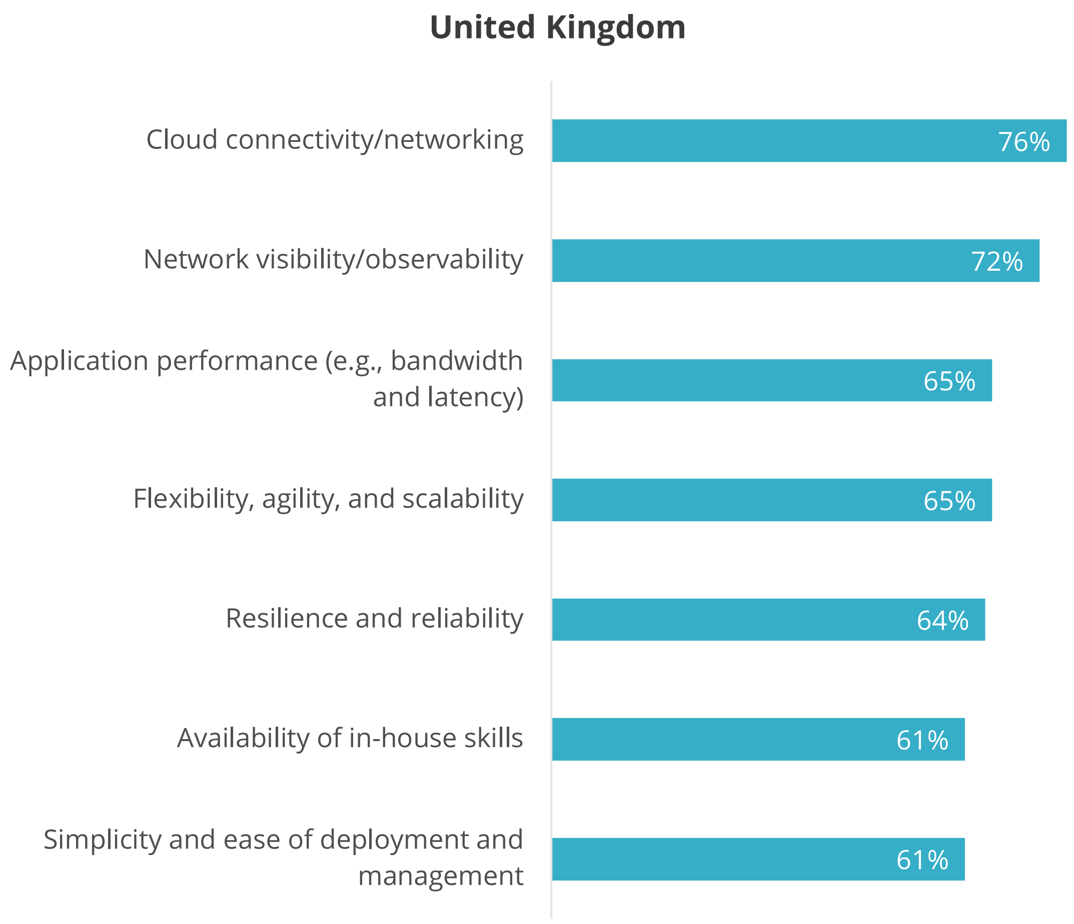
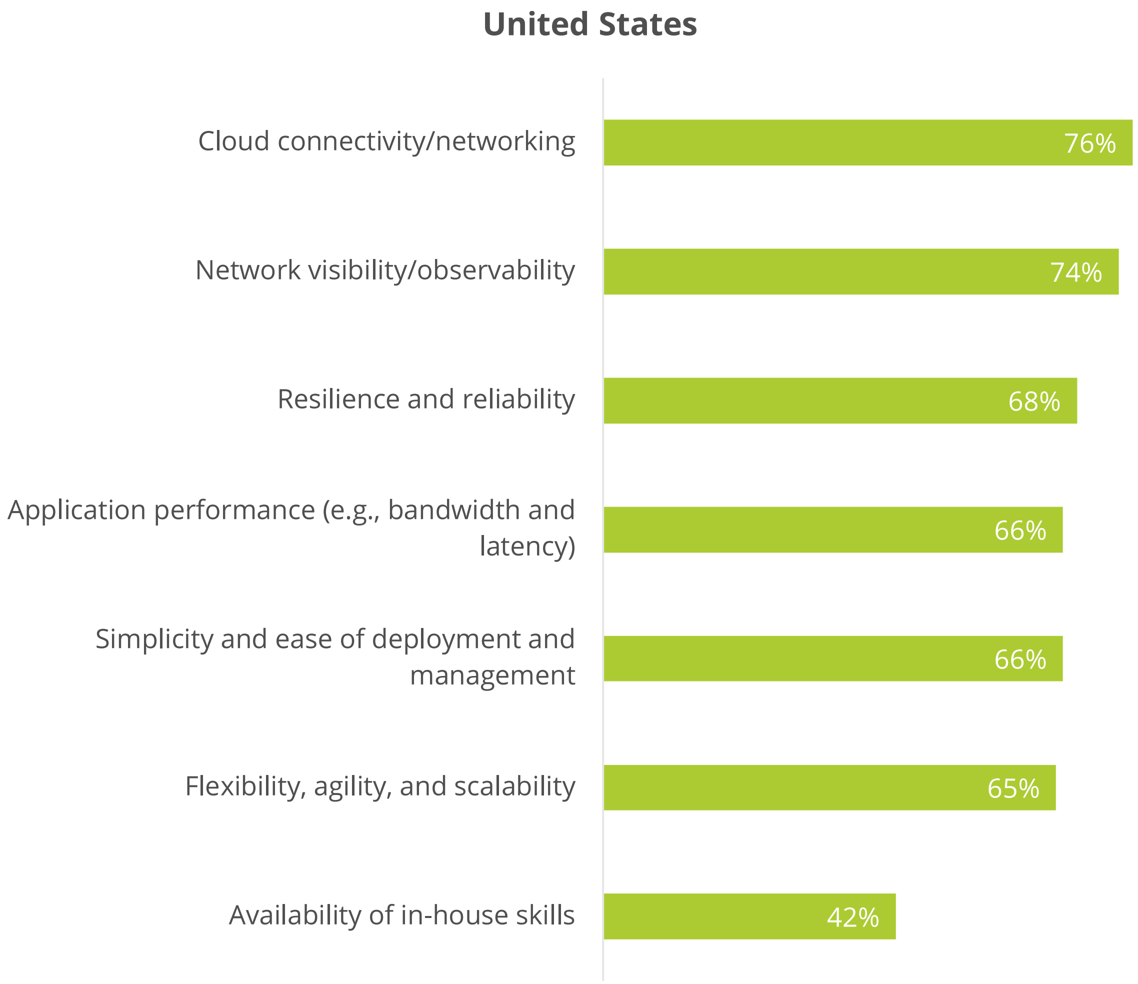
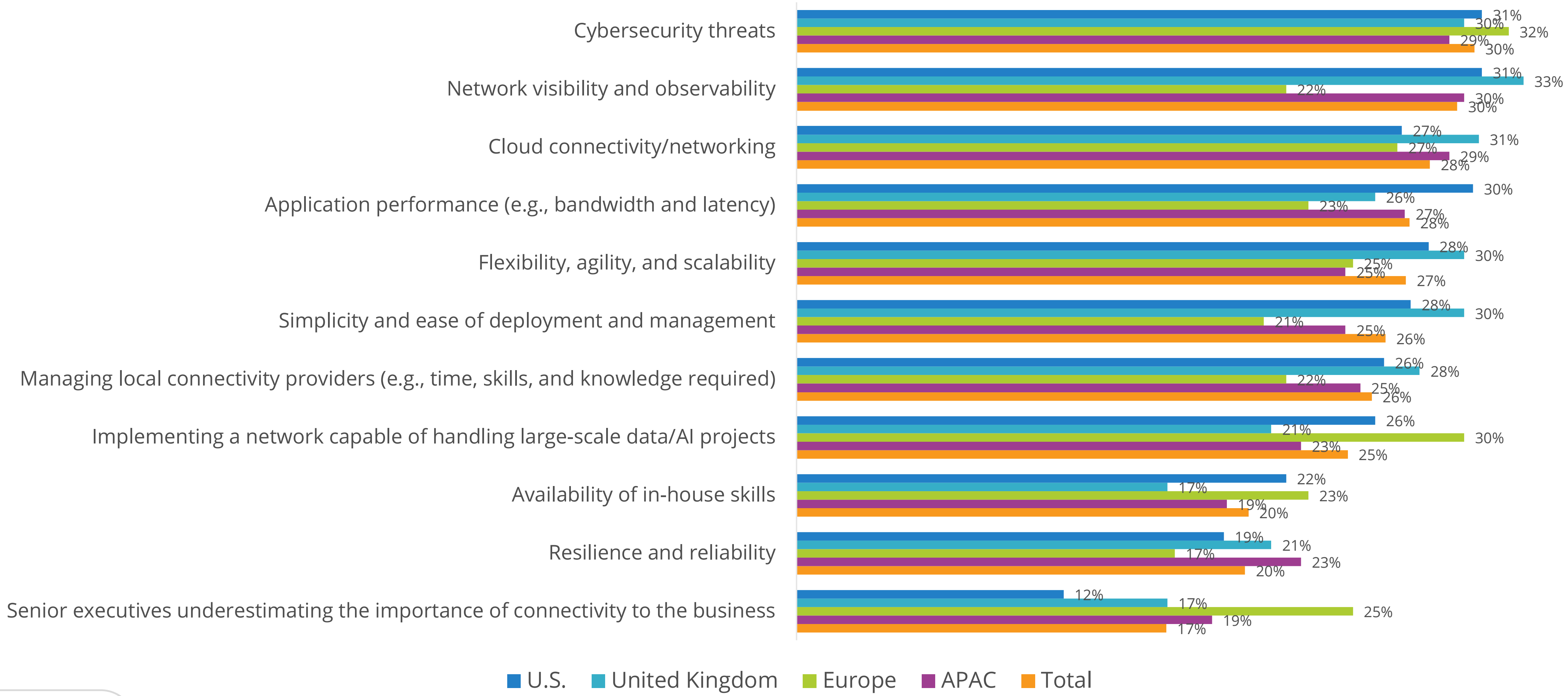




Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Security, cloud connectivity, and network visibility are crucial areas that companies must get right but which they find the most challenging.

Q: Which of the following areas of networking/connectivity are currently challenging? [Choose all that apply]

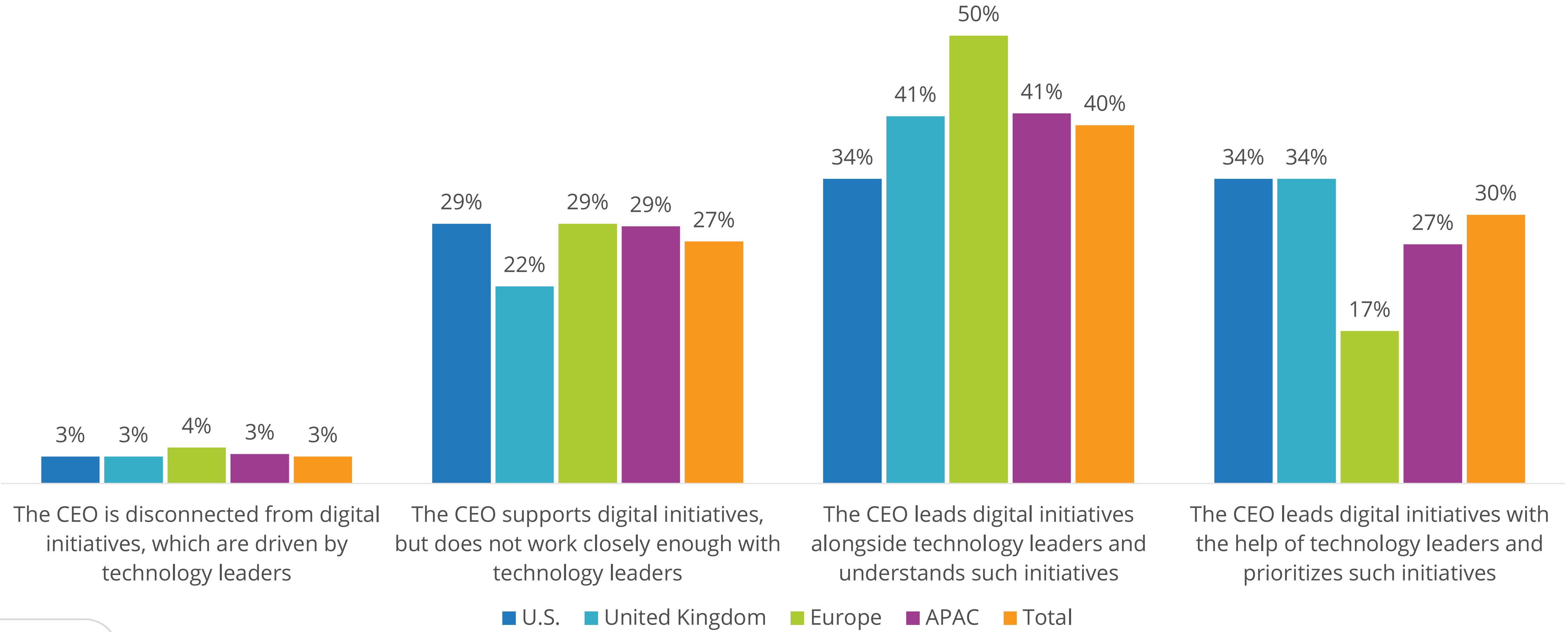


Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Technology Leadership

In most surveyed organizations, CEOs lead digital initiatives alongside technology leaders; however, more than one out of four global organizations experiences a disconnect between CEOs and tech leaders.

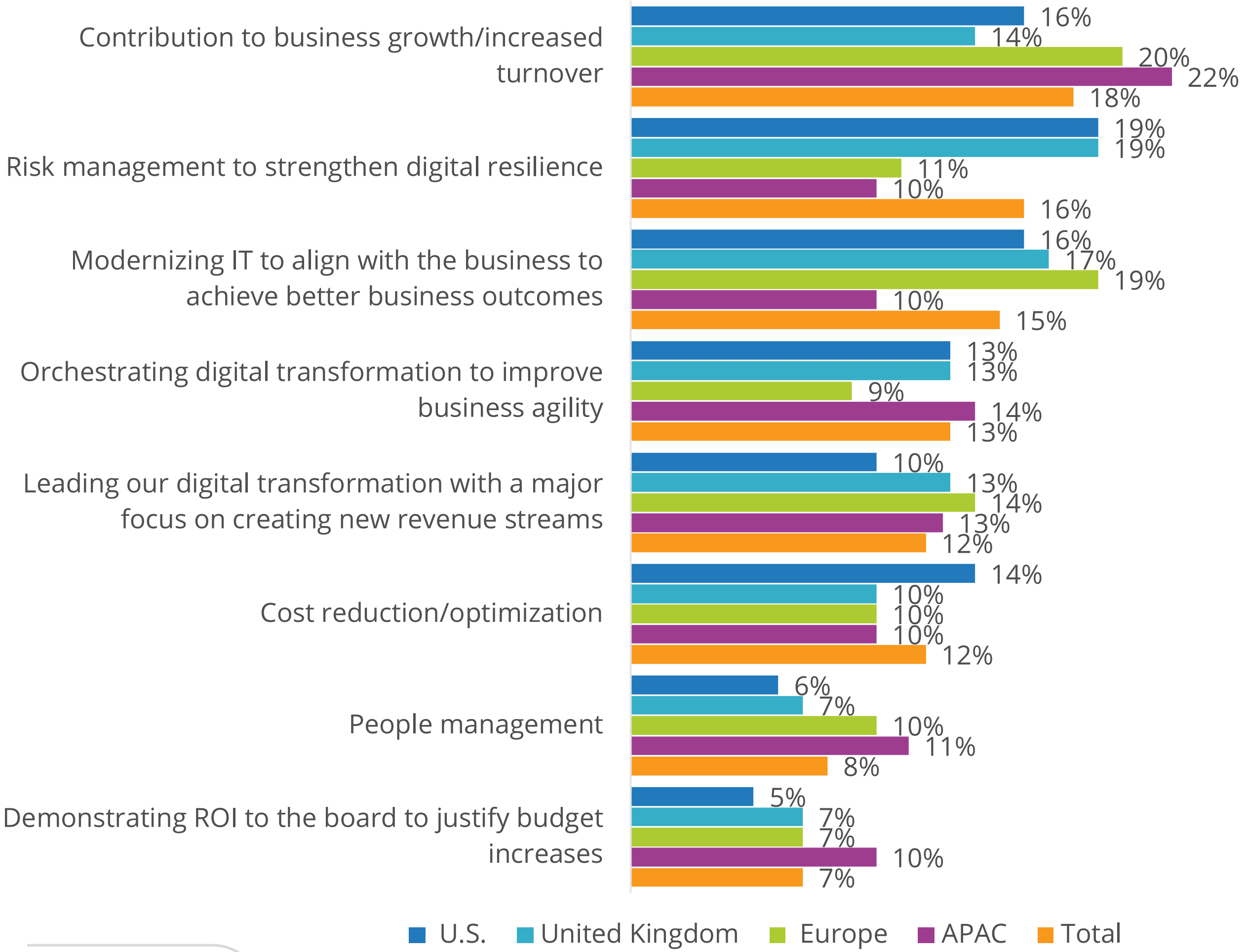
Q: Which of the following statements best describes your organization's executive team/C-suite dynamics regarding digital transformation initiatives? (% of respondents)

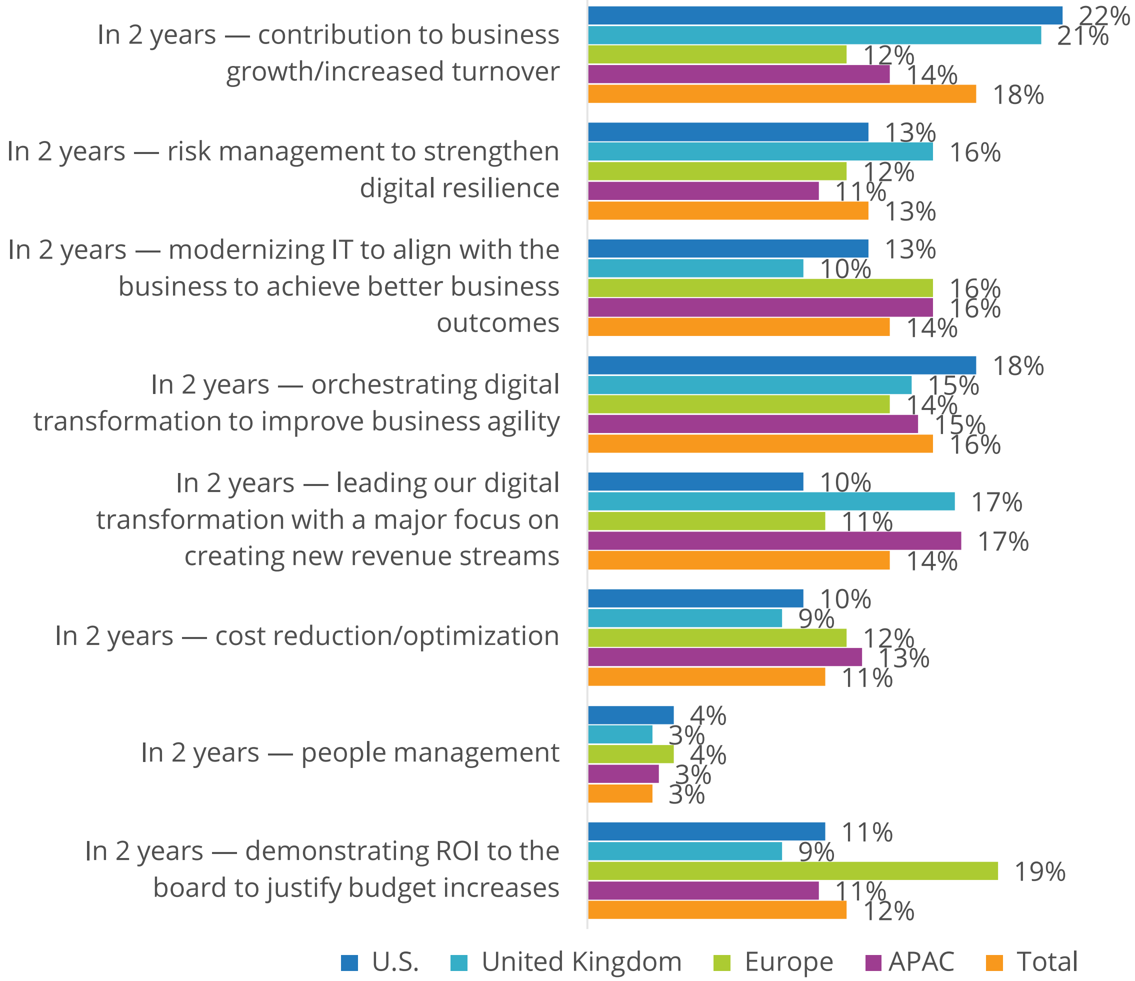


Source: IDC's *Technology Leaders' Priorities Survey for Expereo* (N = 650)

Currently, technology leaders are mainly required to contribute to business growth, risk management, and IT modernization. In two years, expectations regarding digital transformation orchestration and digital revenue generation will be higher.

Q: Which of the following is your technology leaders' top priority for your organization today? What will the top priority be 2 years from now? (% of respondents)

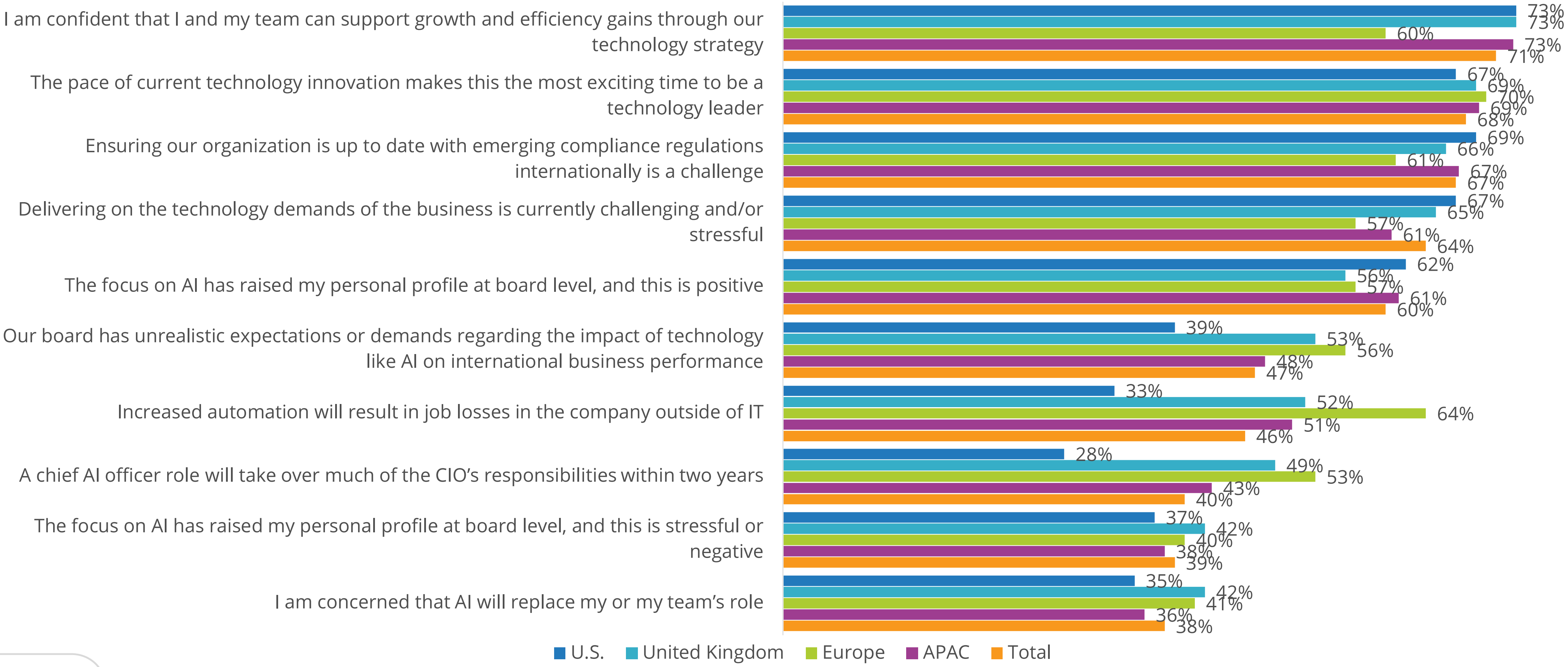




Source: IDC Technology Leaders Survey, March 2024 (N = 650)

Technology leaders are confident about their capabilities and excited by the pace of technology innovation; less than half believe AI will replace their jobs or teams.

Q: With which of the following statements do you, as a technology leader, agree? (% of respondents choosing “Agree” or “Strongly Agree”)



Source: IDC Technology Leaders Survey, March 2024 (N = 650)

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