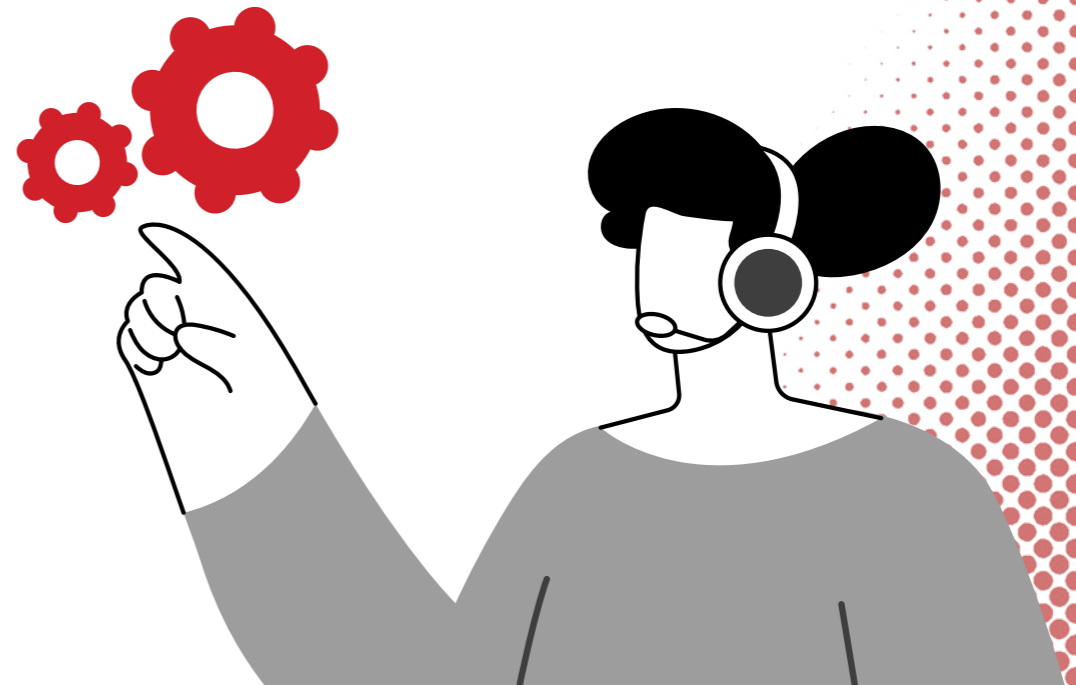


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DIGITAL TECHNOLOGY REPORT AT **GITEX** 2023

A  priorities **Report**



CONTENTS

INTRODUCTION 3

1. INFRASTRUCTURE 4

2. SECURITY 11

3. AI 18

REPORT SUMMARY 23



INTRODUCTION

It's no exaggeration to state that digitalisation has changed our world. From the way we manage our money, to ground-breaking new developments in healthcare; from VR in manufacturing and opportunities to deliver education more effectively, no industry has been untouched by IT innovation.

And it's an industry that rarely stands still, with new technology constantly emerging. For the modern C-suite, there are numerous opportunities to use technology to drive business efficiencies and streamline processes while delivering better-than-ever customer experiences.

In this report, we explore this in detail, identifying the digital technology priorities for CIOs and the wider C-suite looking ahead.

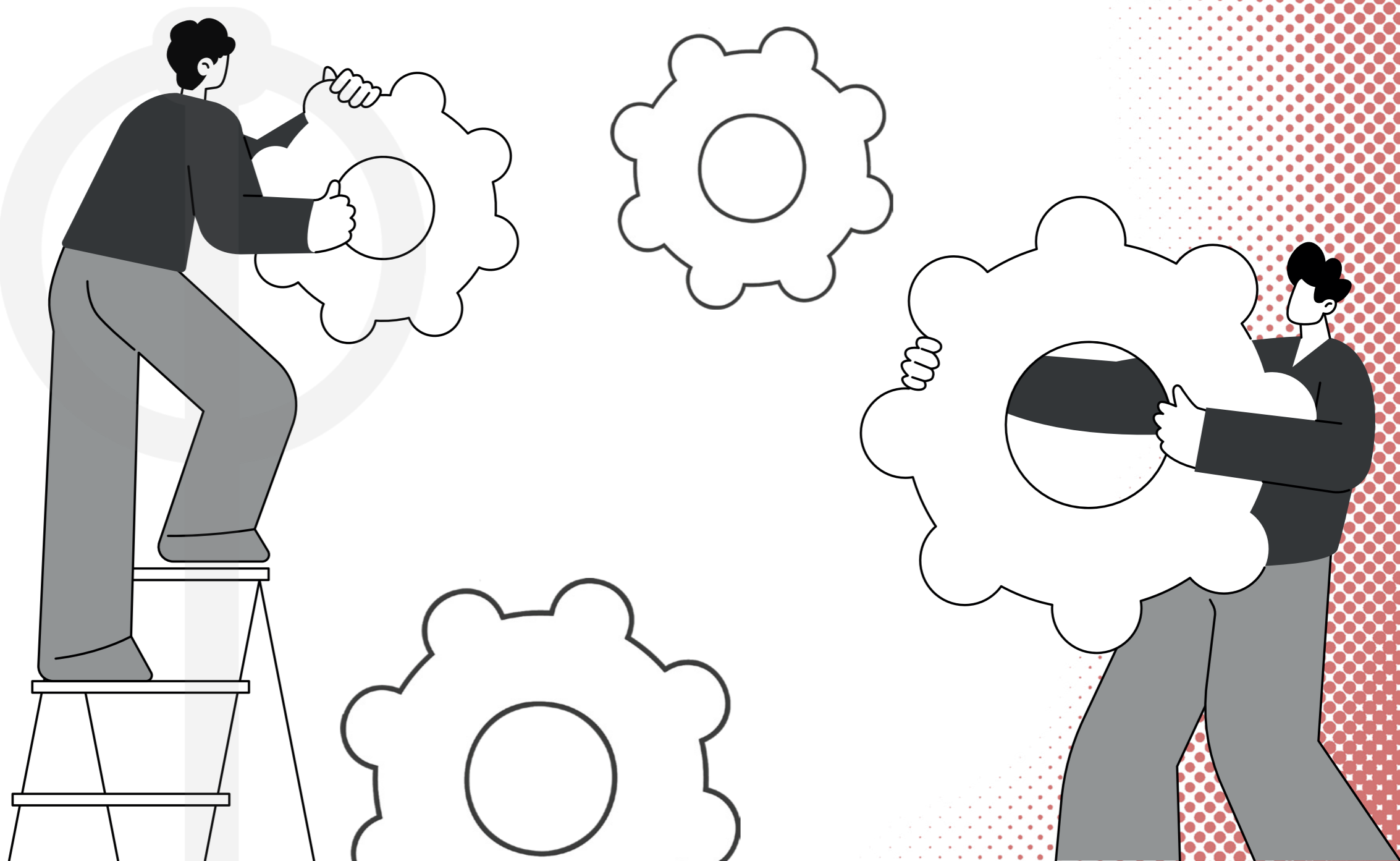
Through our survey of 500 industry leaders, we have obtained key insights into digital technology strategies across the region and highlighted what businesses are looking for when it comes to prioritising investment.

The report will include insight into the following:

- The impact of digitalisation
- Key technology investment areas
- Digital priorities for the future

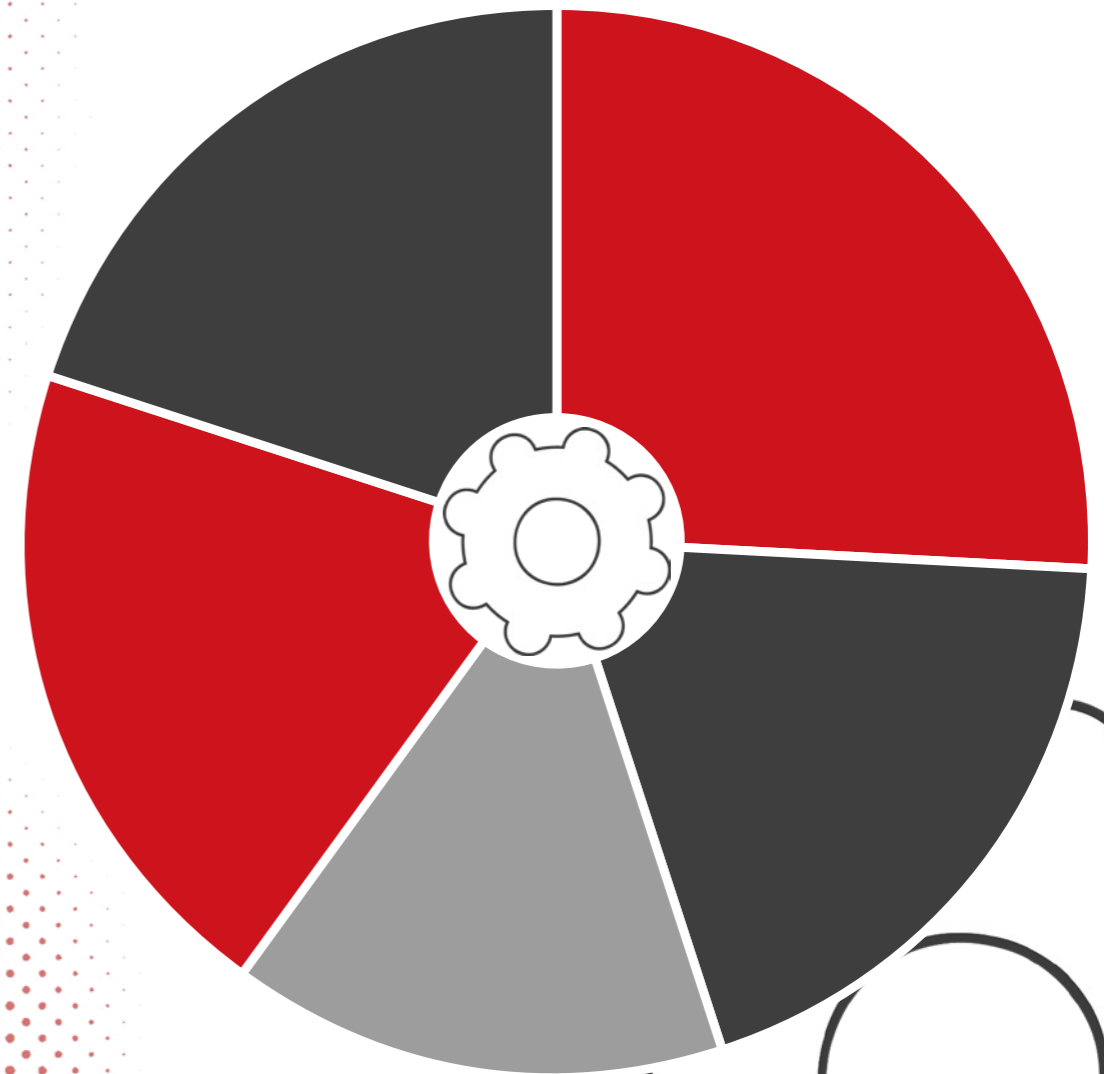
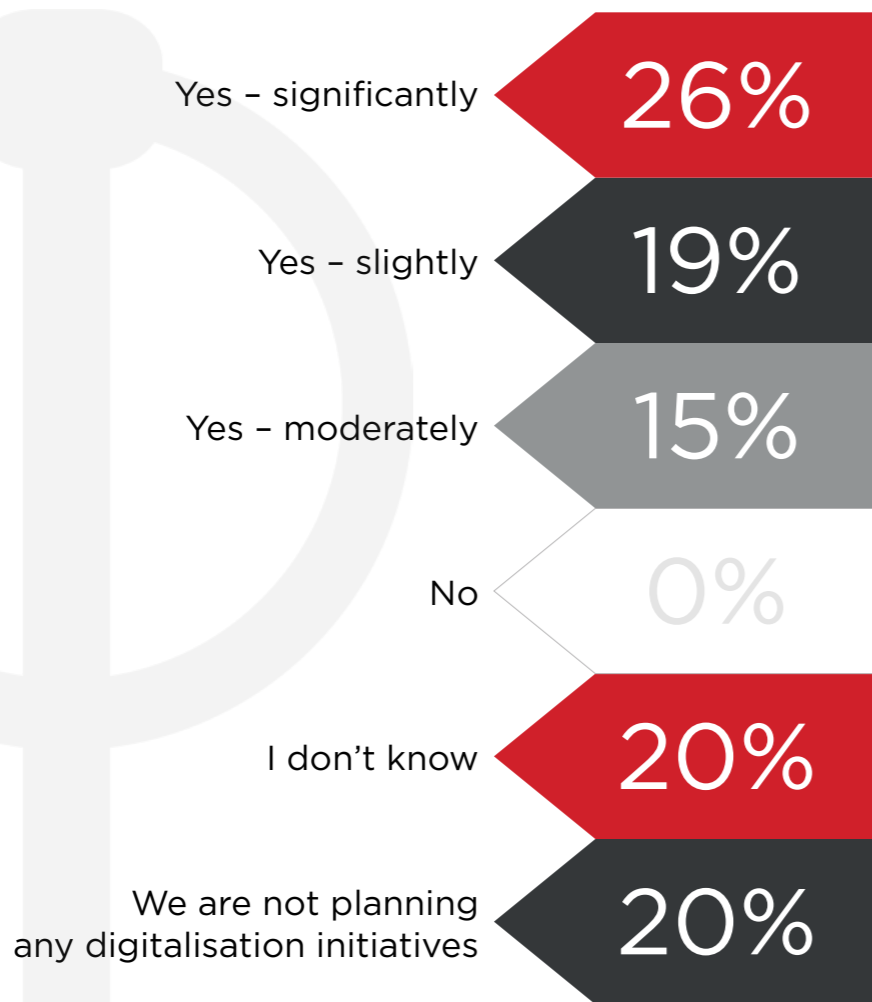
SECTION 1

INFRASTRUCTURE



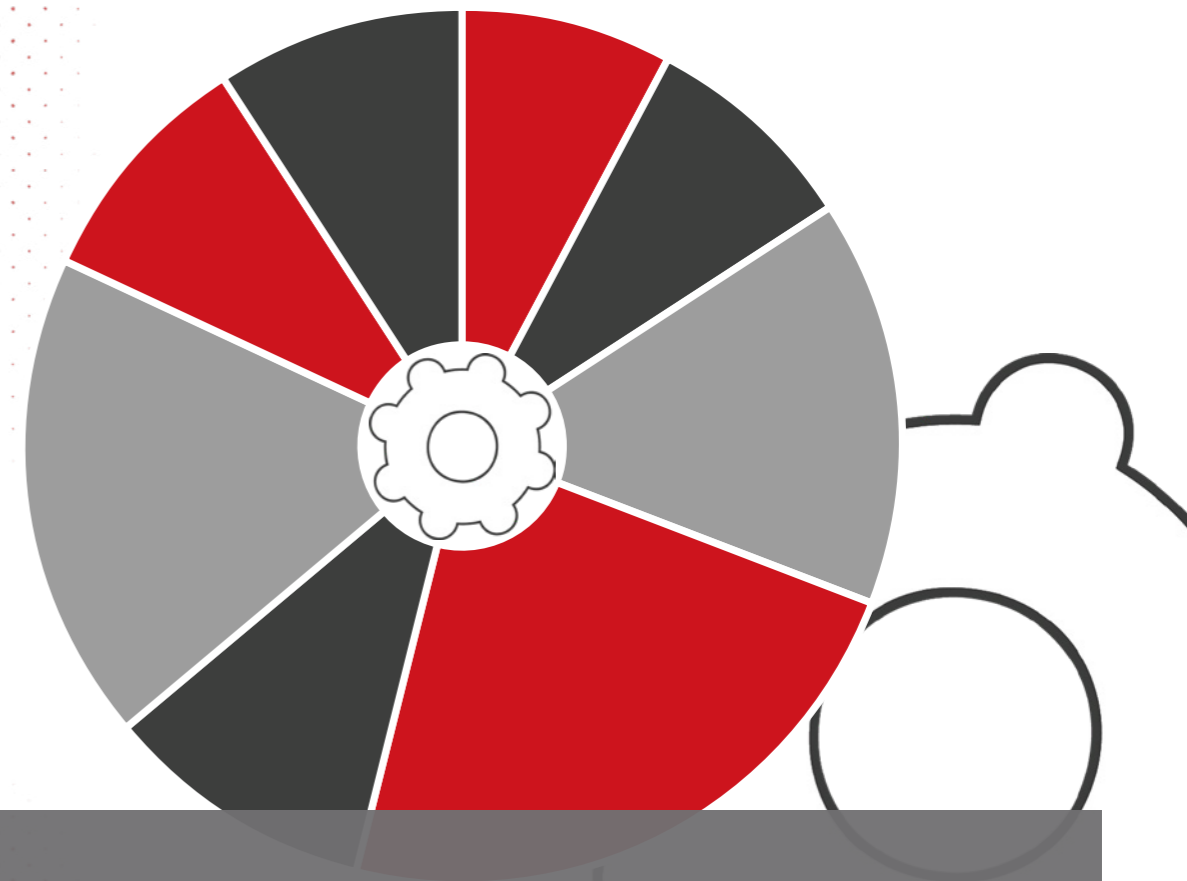
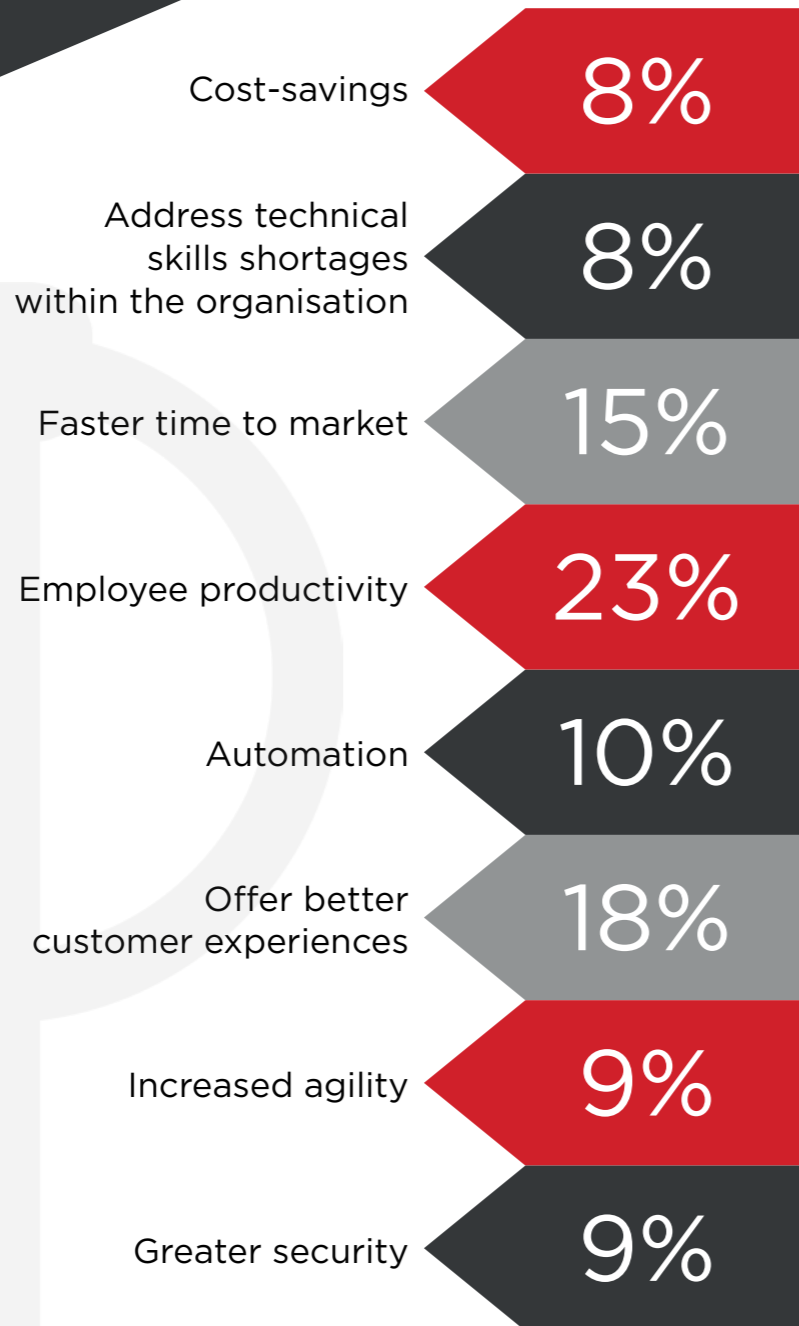
QUESTION 1

Has your organisation increased investment in Digital Transformation projects in the last 12 months?



QUESTION 2

Which of the following are most important to you in your digitalisation journey? From 1 (most important) to 5 (least important).



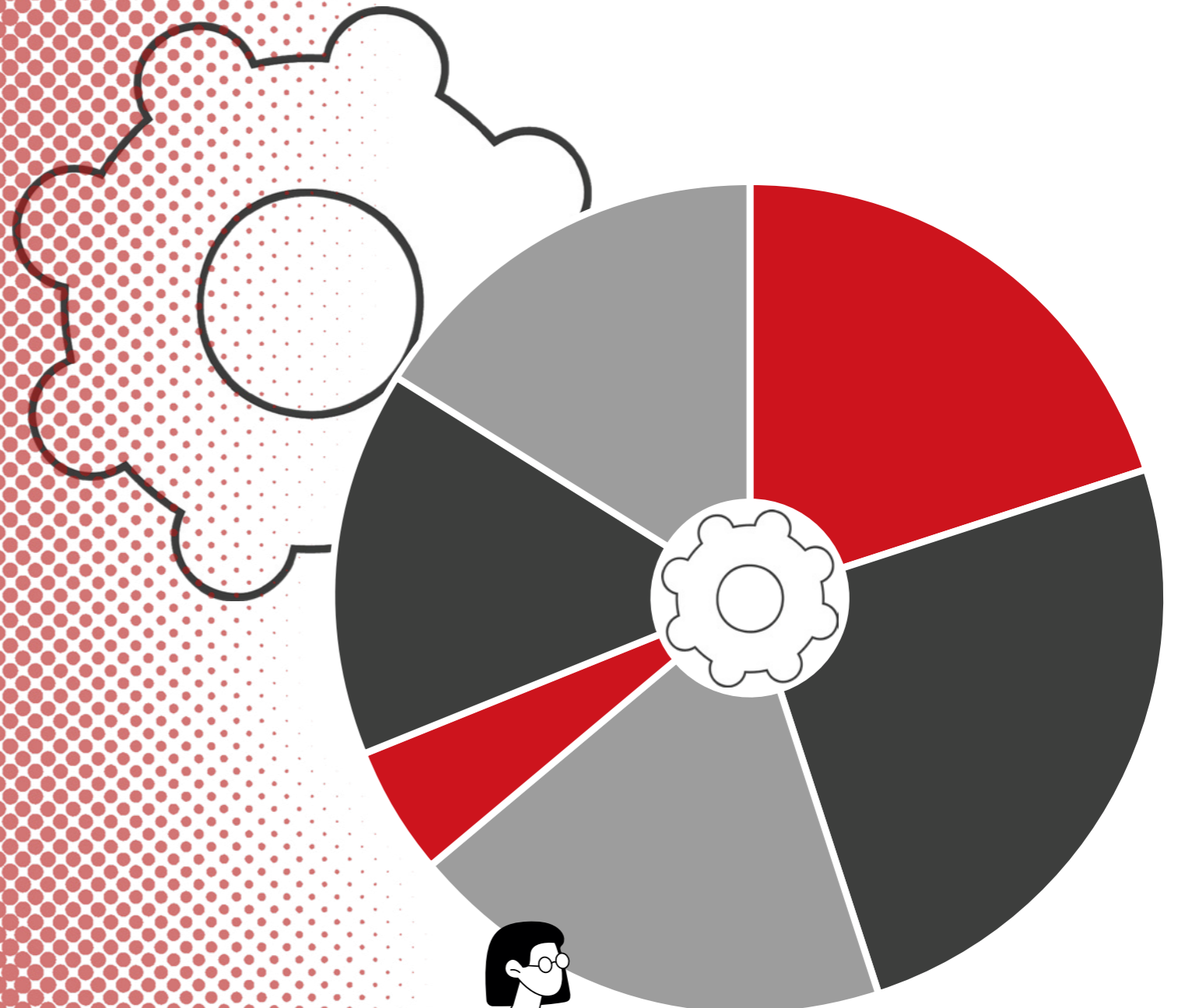
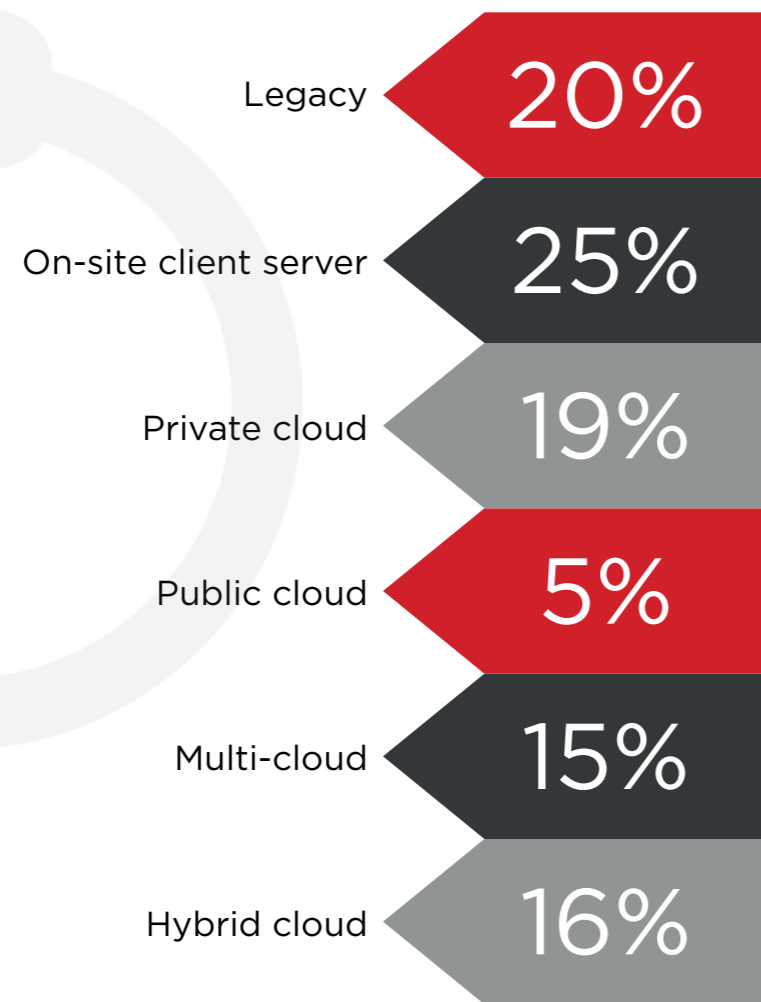
KEY FINDINGS

More than half (60%) of organisations have increased their investment in Digital Transformation projects in the last 12 months, and only 20% said that they are not planning any such initiatives. Digitalisation clearly remains top of mind for organisations in the region, with employee productivity one of the most important factors during this process. Improved customer experiences and faster time to market were also key considerations.

Given the ongoing cost-of-living crisis, companies are having to seriously consider their bottom line, so it is no surprise that organisations need their technology investments to increase productivity while providing exceptional service to customers.

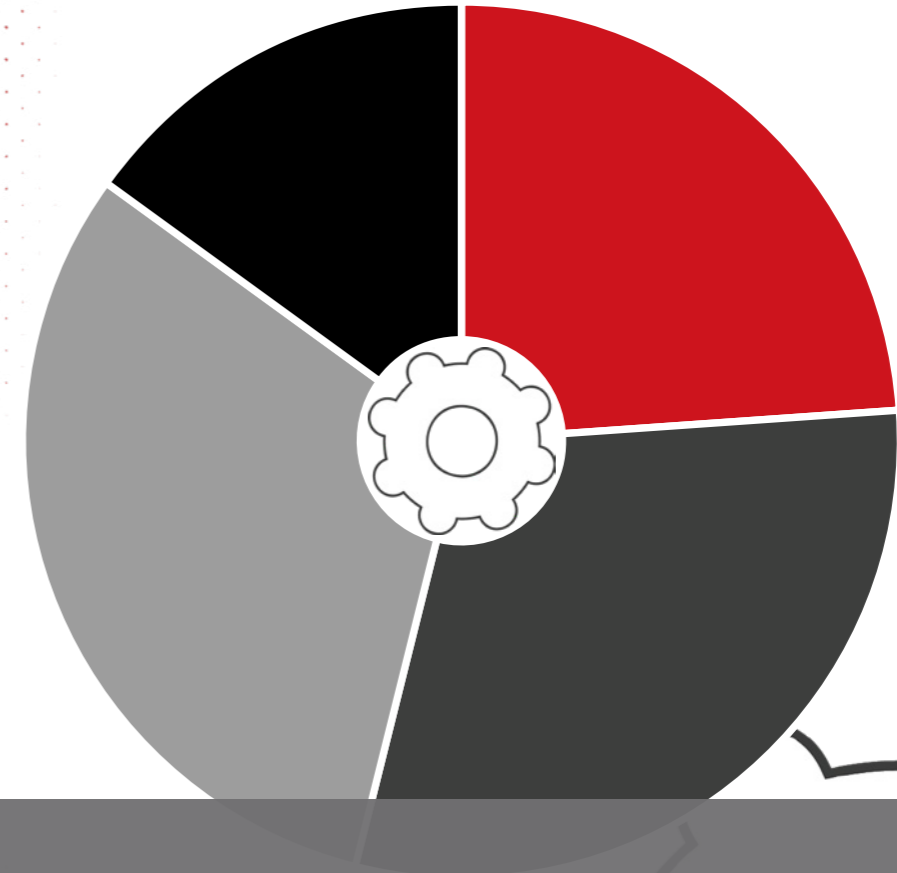
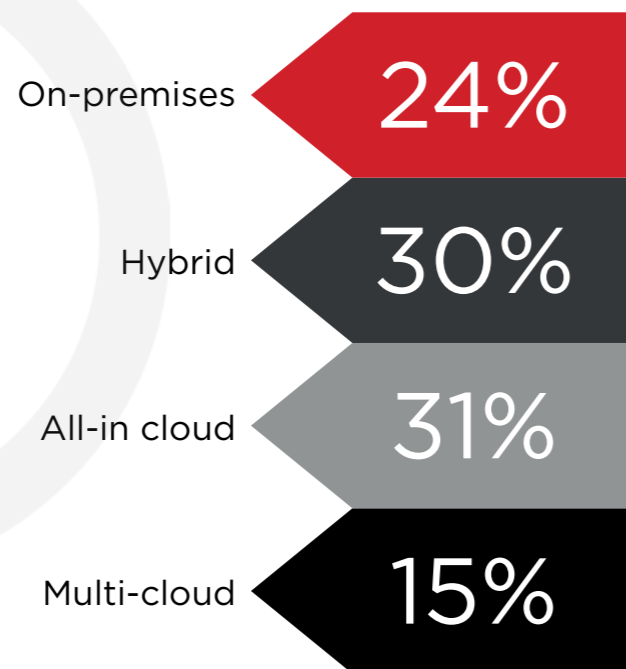
QUESTION 3

Which of the following best describes your current infrastructure model?



QUESTION 4

Which of the following best describes your long-term plans for infrastructure?



KEY FINDINGS

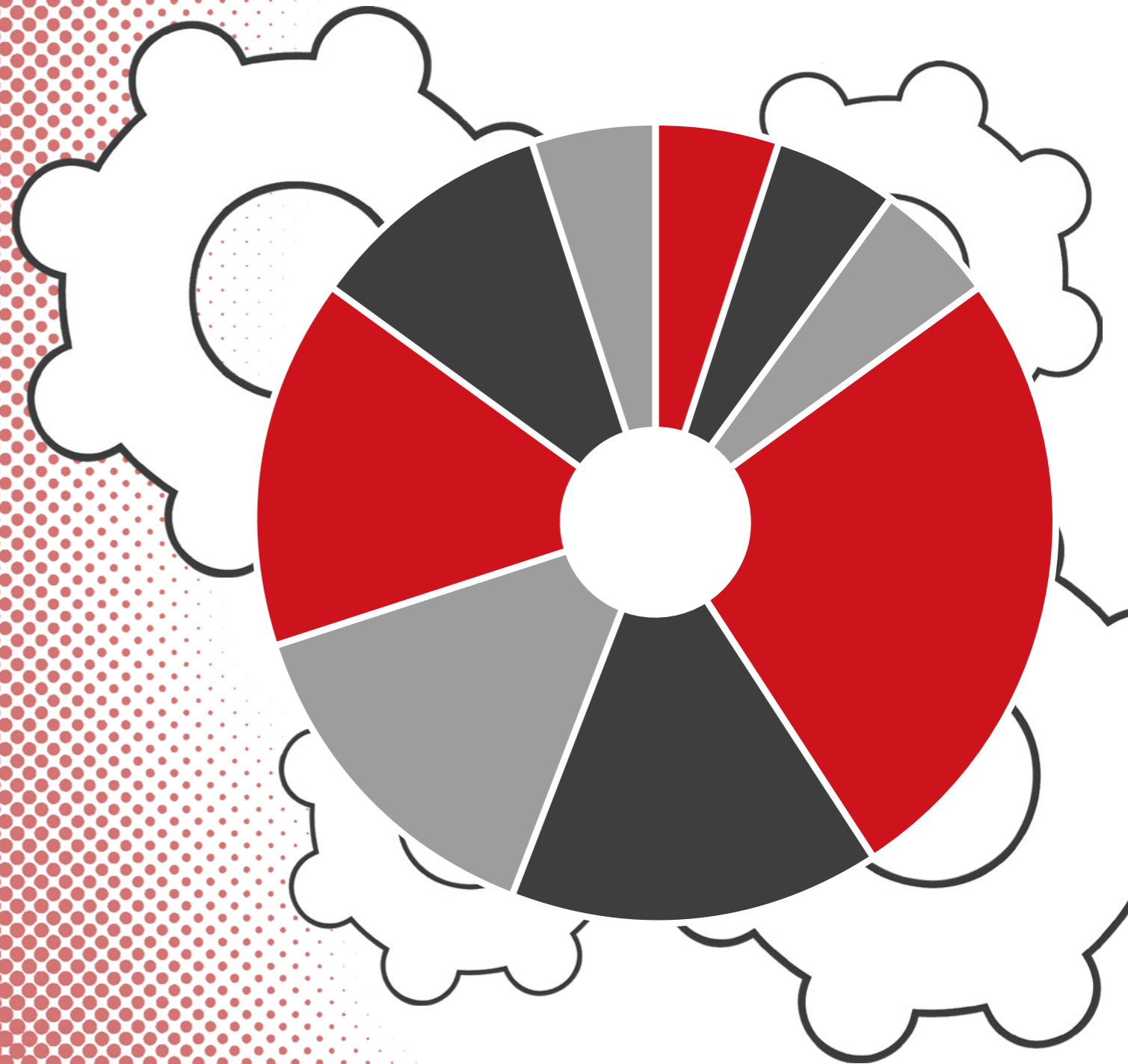
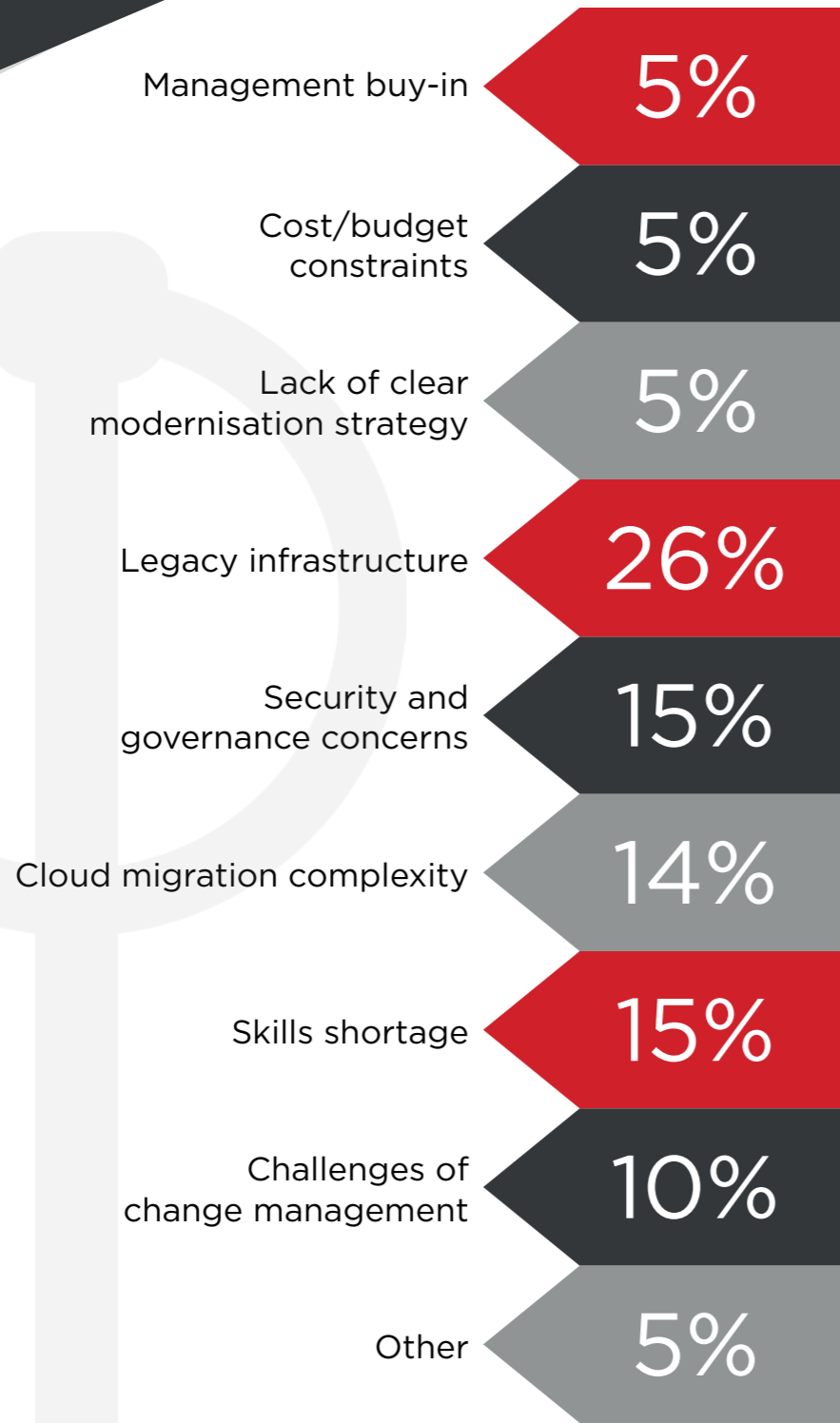
Cloud adoption has widely increased across the region, with both private and public sector now tapping into the benefits of cloud – namely increased flexibility, agility and cost-savings. The survey shows that just over half of respondents are using cloud in some capacity – with the vote split across private (19%), public (5%), multi (15%) and hybrid (16%).

When considering the long-term plans for infrastructure, only 24% said that they would remain on-premises. The remaining share of the vote was split across cloud.

Given the importance of cloud to organisations which are continuing on their digital roadmaps, it's important that they have a robust cloud strategy to make sure they can tap into the benefits of this infrastructure and achieve long-term business goals.

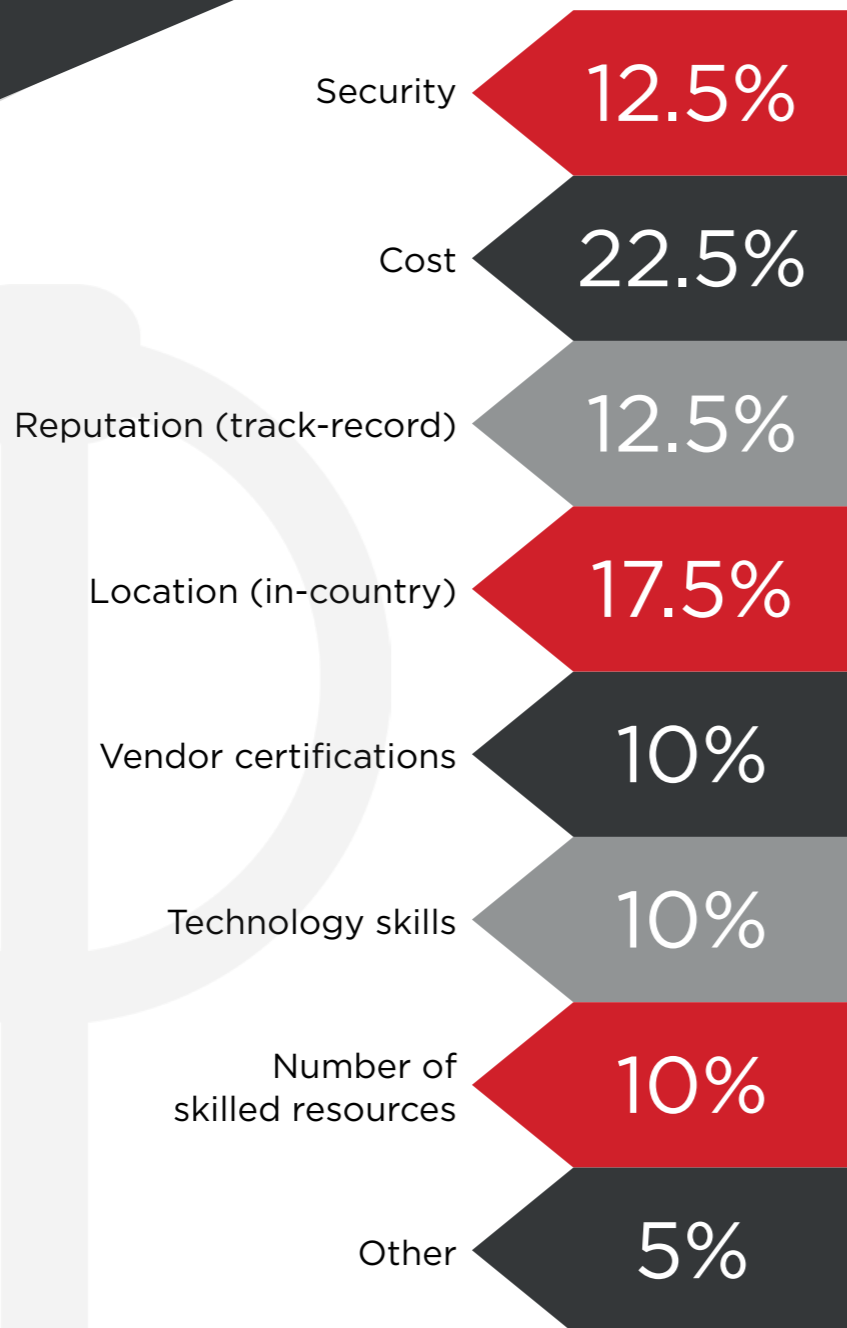
QUESTION 5

What do you consider to be the biggest inhibitor to infrastructure modernisation (if any)?



QUESTION 6

What are the most important considerations for you when selecting an infrastructure partner?



KEY FINDINGS

While many organisations are clearly looking to modernise their infrastructure, this process can be a complex journey at times. For 26% of survey respondents, legacy infrastructure was considered the biggest inhibitor to infrastructure modernisation, followed by security and governance concerns (15%), skills shortage (15%) and cloud migration complexity (14%). However, the results are split across a number of different inhibiting factors, which demonstrates that there are multiple considerations for organisations looking to embark on an infrastructure modernisation journey.

A good technology partner can be crucial in overcoming some of these obstacles and for participants in this survey, the most important considerations when selecting a partner were cost (22.5%) and location (17.5%). Security and reputation both had a 12.5% share of the vote followed by vendor certifications, technology skills and number of skilled resources.

This demonstrates that organisations ultimately care most about the cost of the project when selecting a partner, but it's also very important that they can trust who they're dealing with, that they're secure and that they are close enough to provide any further support if required.

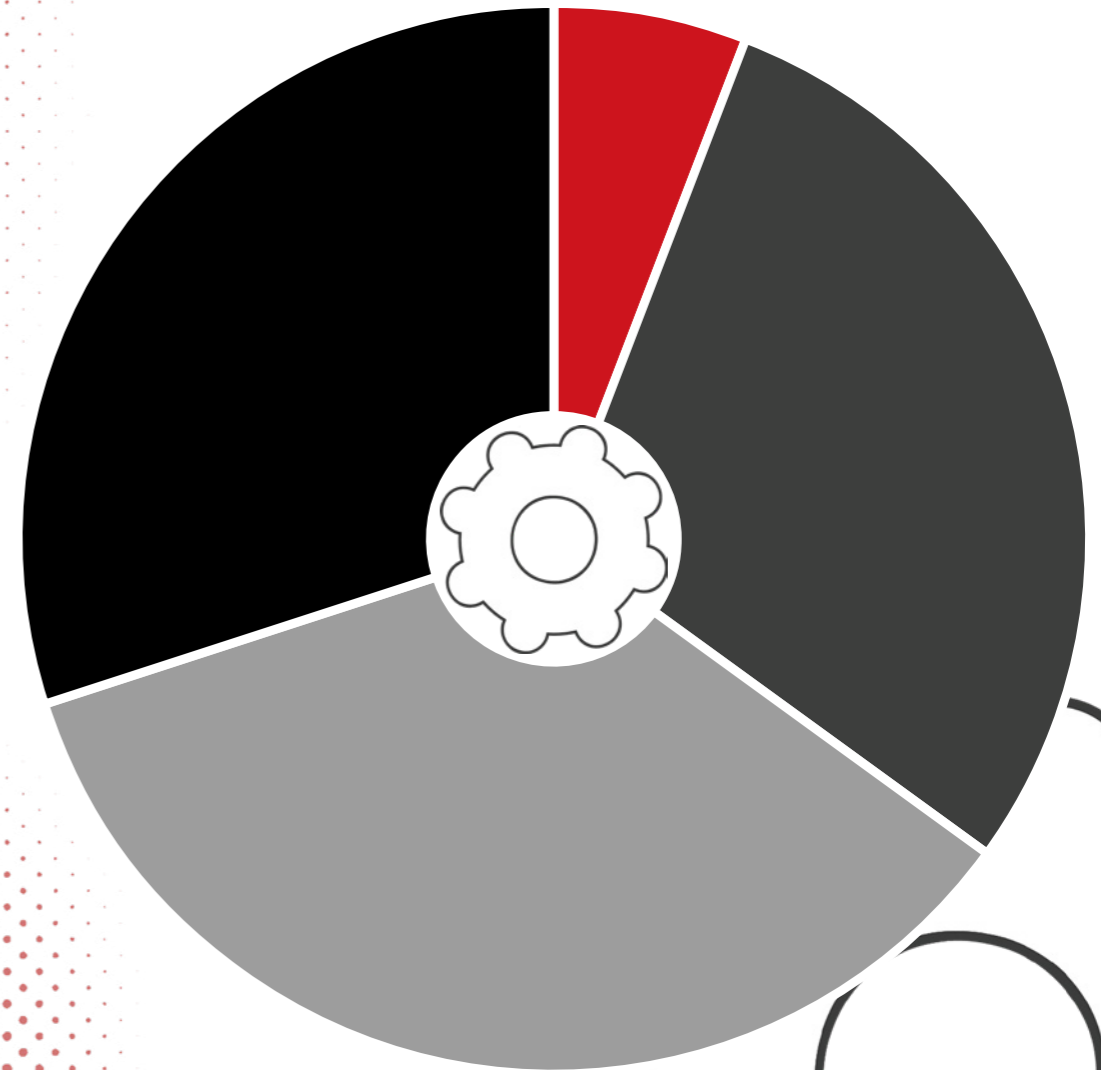
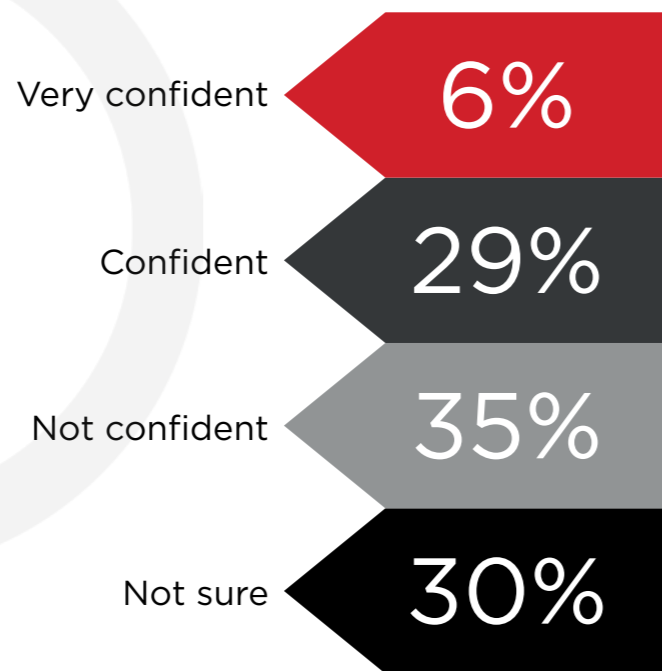
SECTION 2

SECURITY



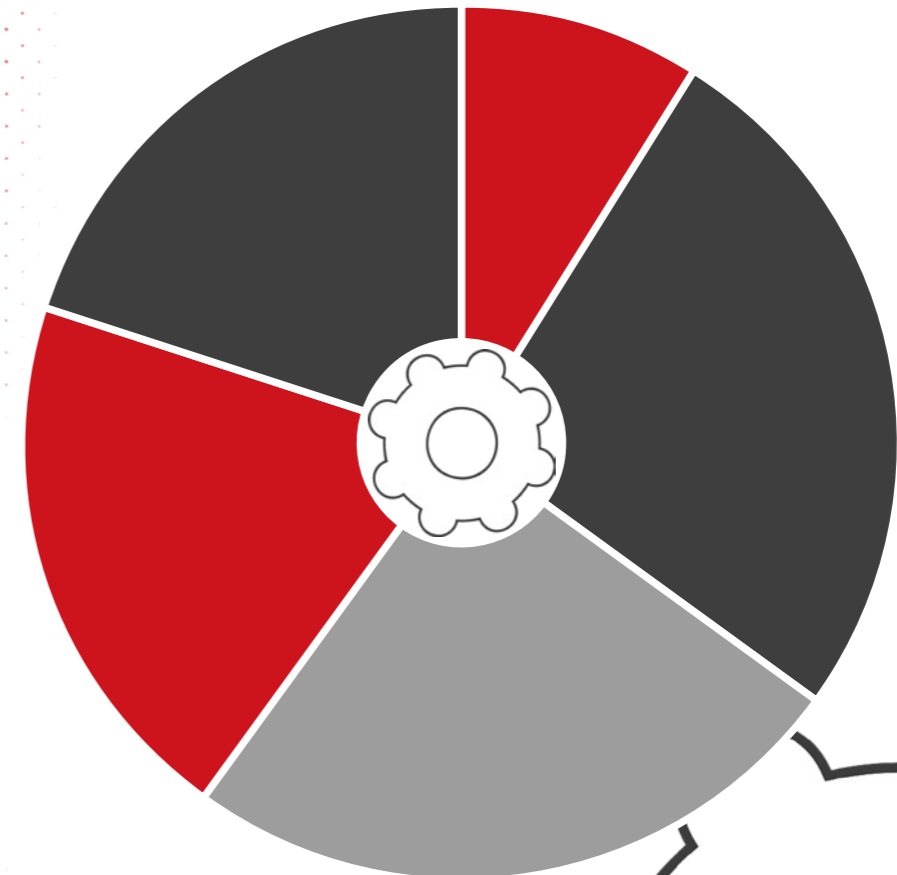
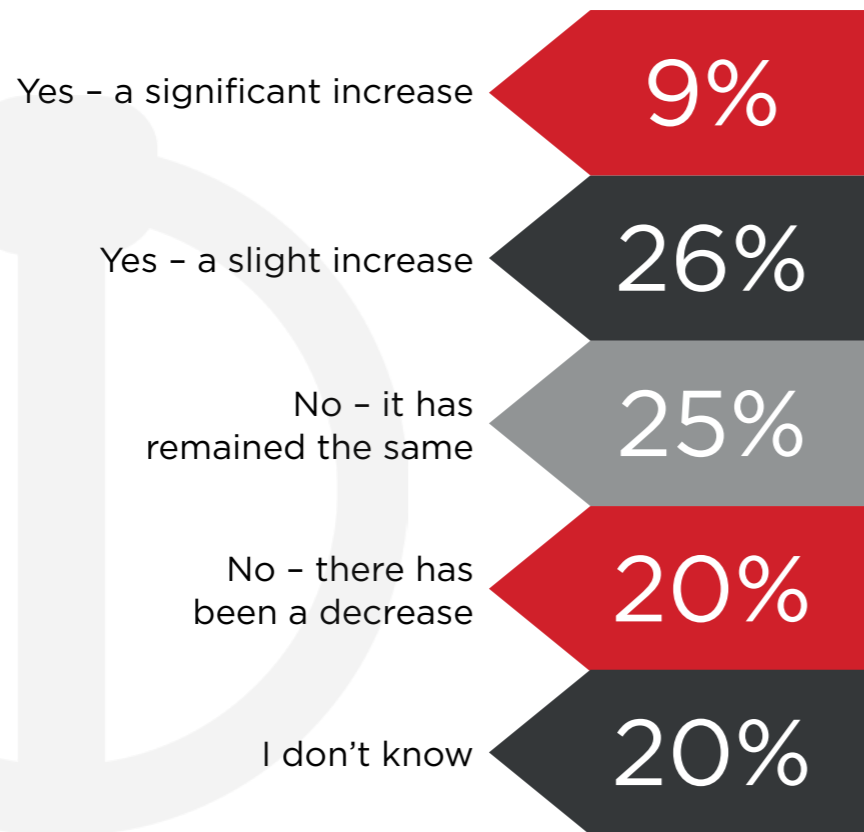
QUESTION 7

How confident are you that developments in cybersecurity are keeping pace with the rise of hybrid working options?



QUESTION 8

Has your organisation seen a change in the number of attacks over the last 12 months?



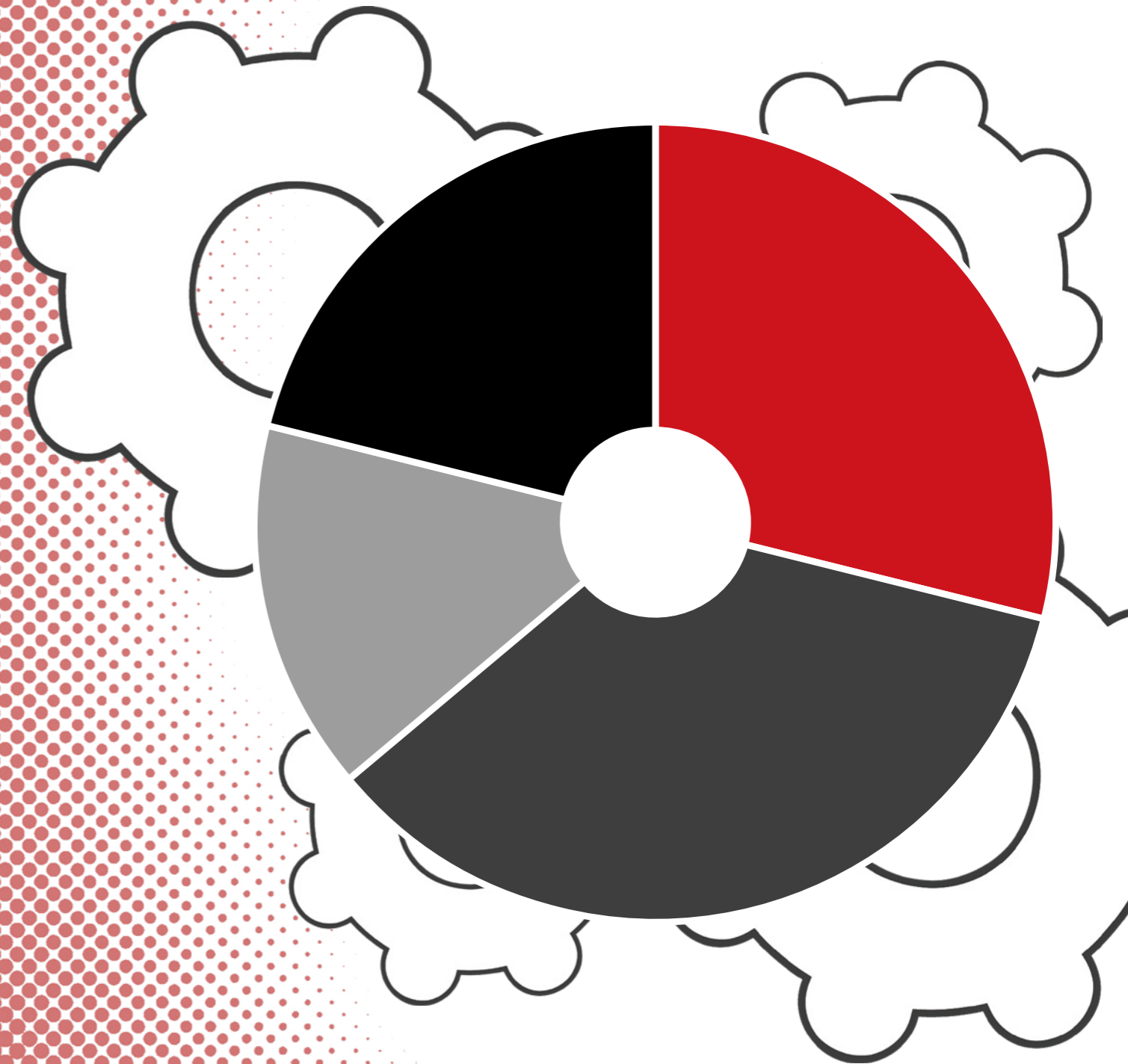
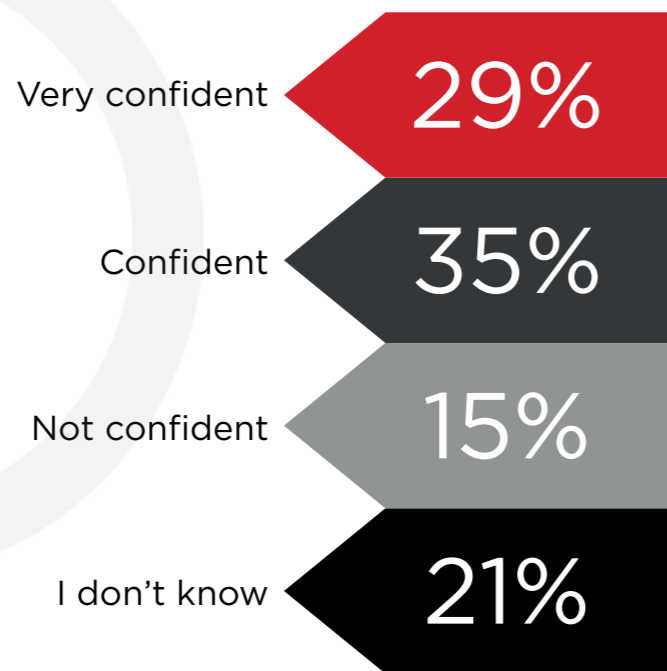
KEY FINDINGS

Hybrid working has become standard for many organisations since COVID-19 forced organisations to split their workforce between office and home locations. That model has continued due to the many benefits it offers employees, though cybersecurity has been a key concern due to the eradication of the traditional secure perimeter. The survey findings do not indicate a high level of confidence among the C-suite that developments in cybersecurity are keeping pace with the rise of hybrid working options.

Interestingly, however, almost half of respondents reported either a decrease or no change in the number of attacks over the last 12 months.

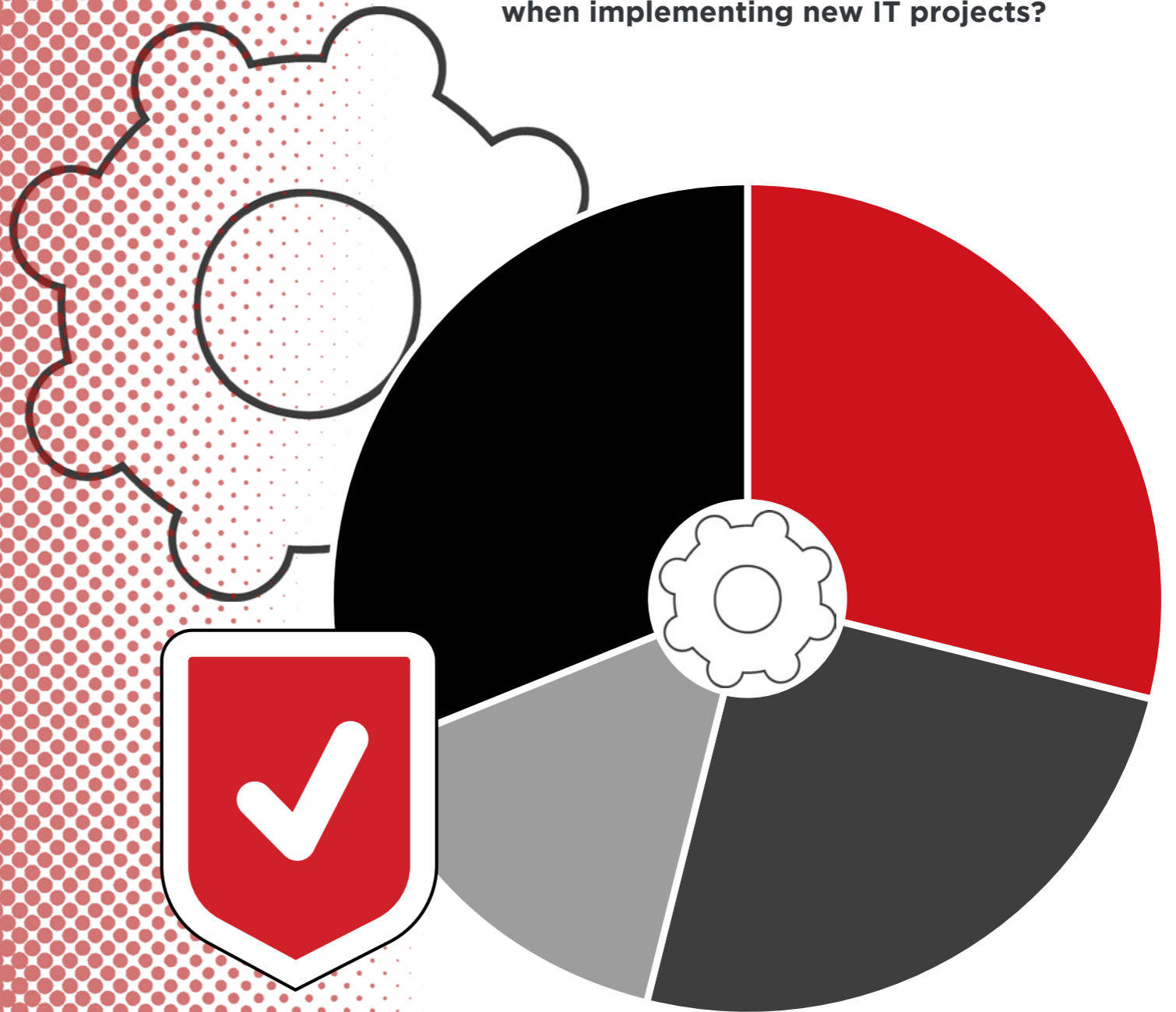
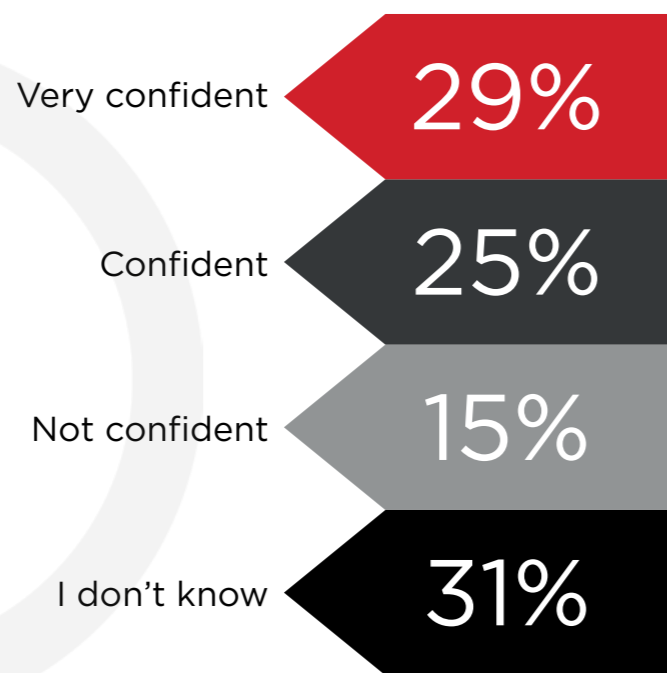
QUESTION 9

How confident are you that your organisation is protected from attacks?



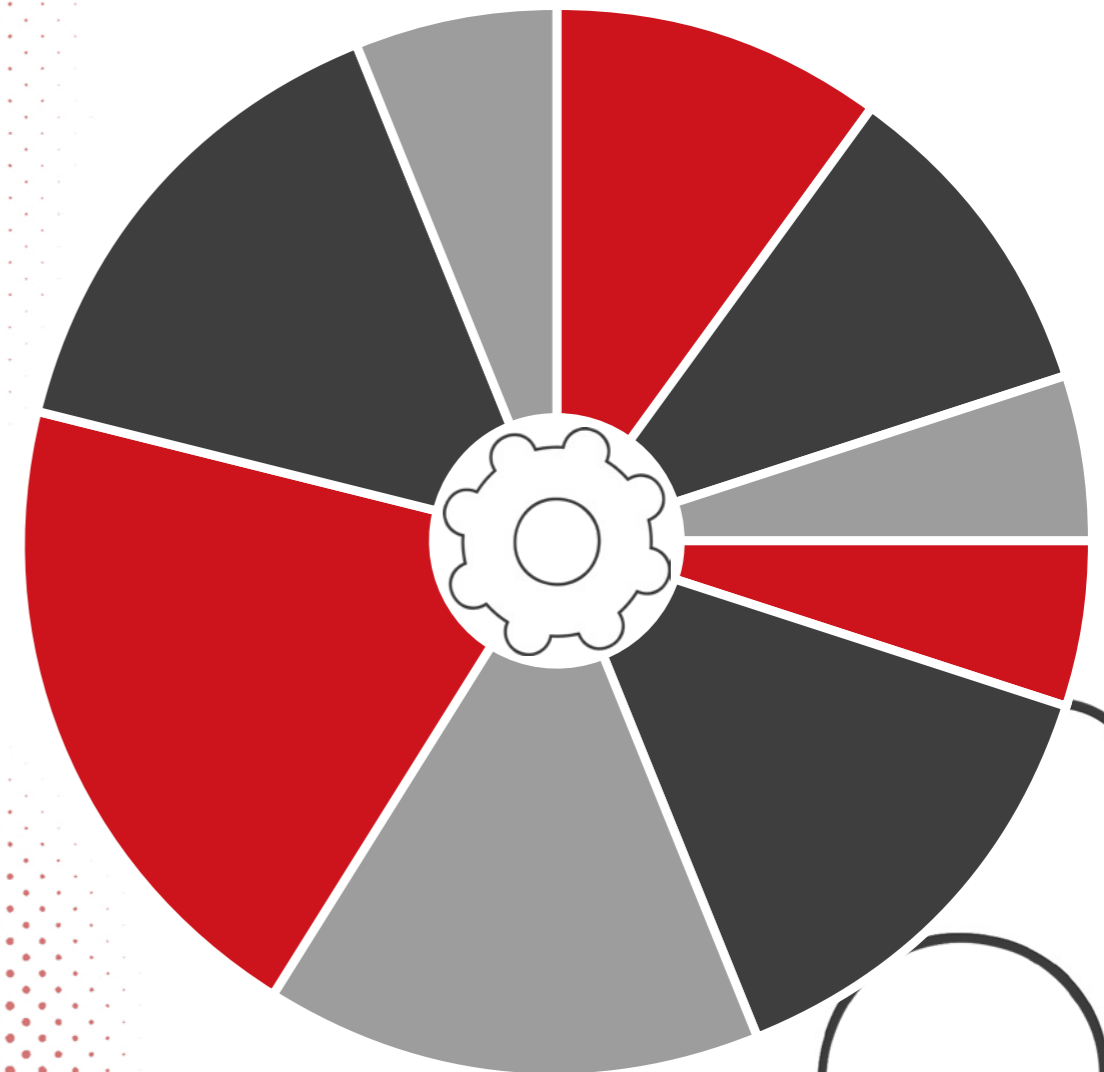
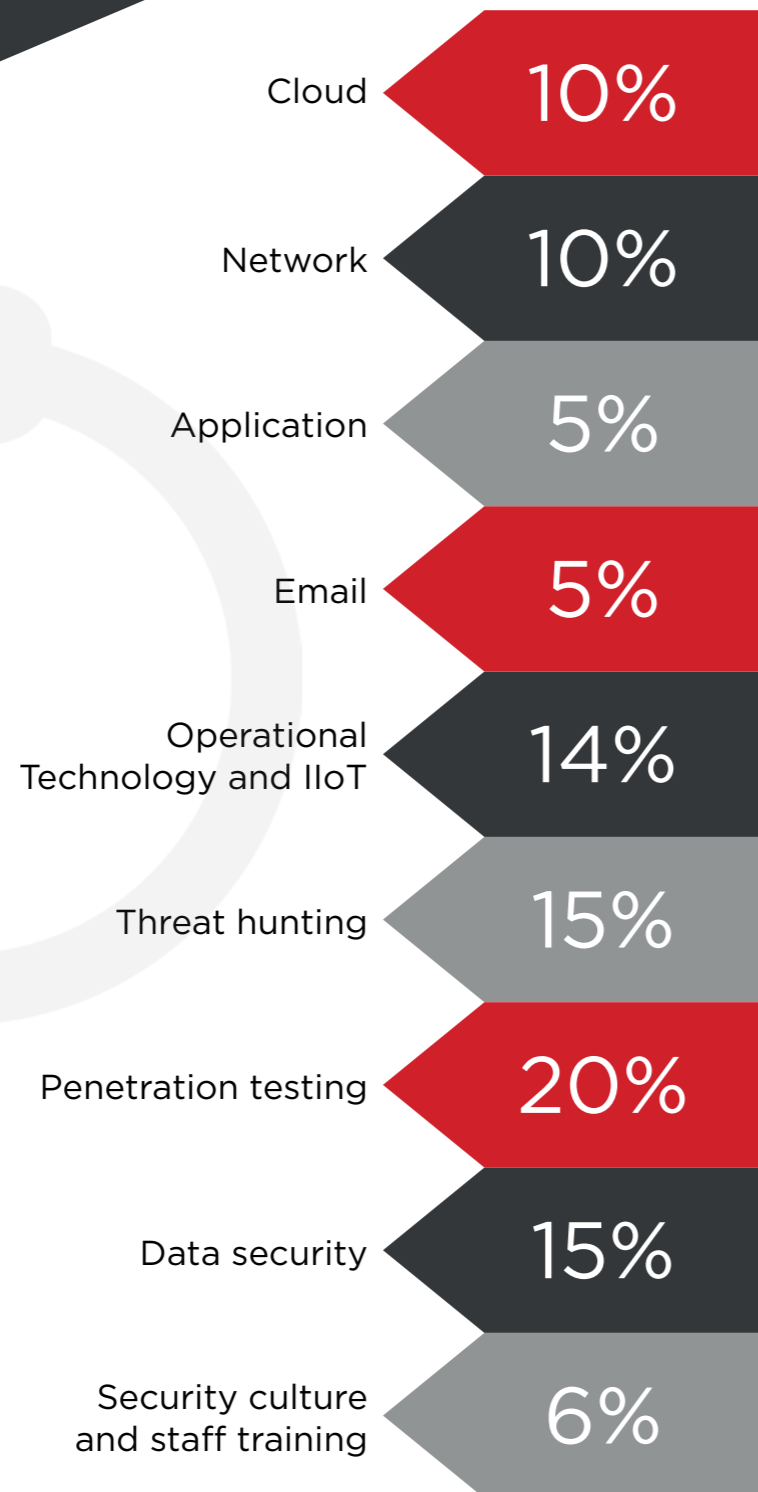
QUESTION 10

How confident are you that your current security measures are strong enough when implementing new IT projects?



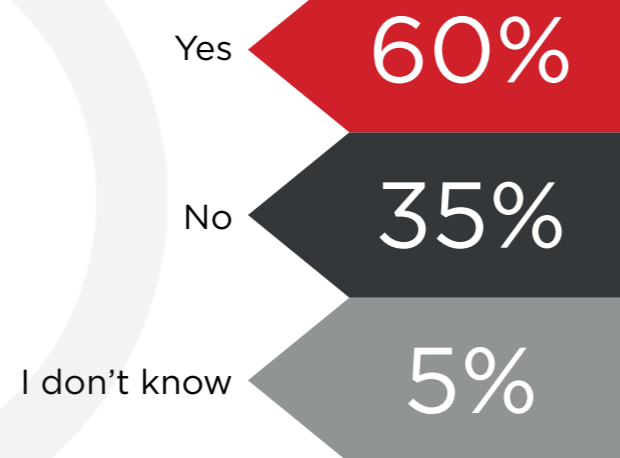
QUESTION 11

Which security areas are priorities for your organisation in the year ahead?



QUESTION 12

Does your organisation have a strong security culture?



KEY FINDINGS

Respondents have a fairly high level of confidence that their organisations are generally protected against cyberattacks (64%), with 15% stating they were not confident and 21% stating they did not know. This is encouraging and shows that despite the increasing threats there is some level of assurance among the C-level executives at least that they are protected from these attacks. However, there is clearly scope to increase this confidence.

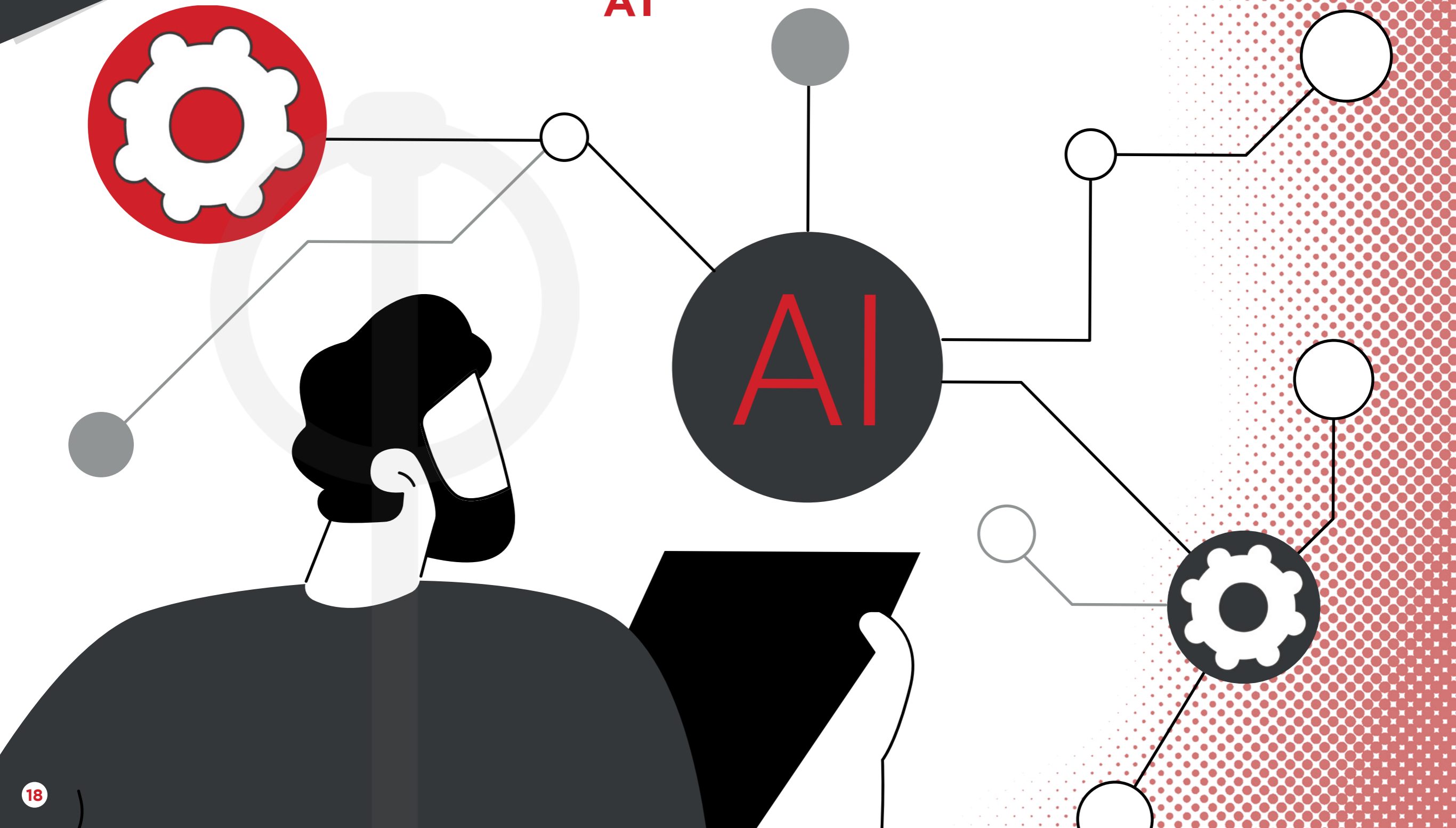
Respondents were also asked how confident they were that their current security measures were strong enough when implementing new IT projects. Given the digital innovation happening across the region, this will be a key concern for everyone – security must be at the core of new projects but not be an inhibitor.

Fortunately, 54% said they were either confident (25%) or very confident (29%). This is important because security could be considered an inhibitor for organisations implementing new projects, but this confidence serves as reassurance that digitalisation plans can progress alongside security controls.

When asked which security areas were priorities for the organisation in the year ahead, the vote was split across all available options, showing the competing areas of focus for modern businesses.

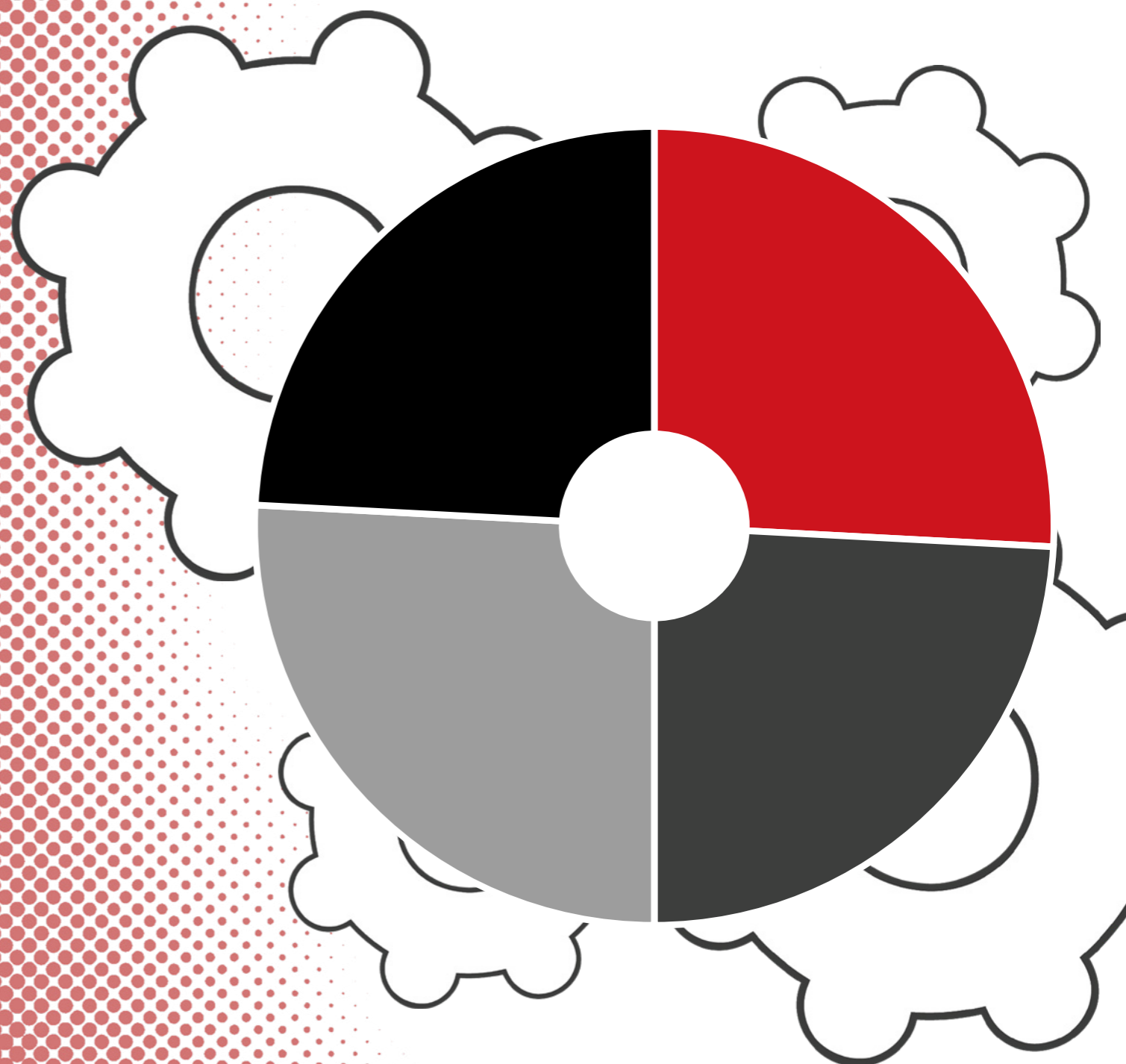
SECTION 3

AI



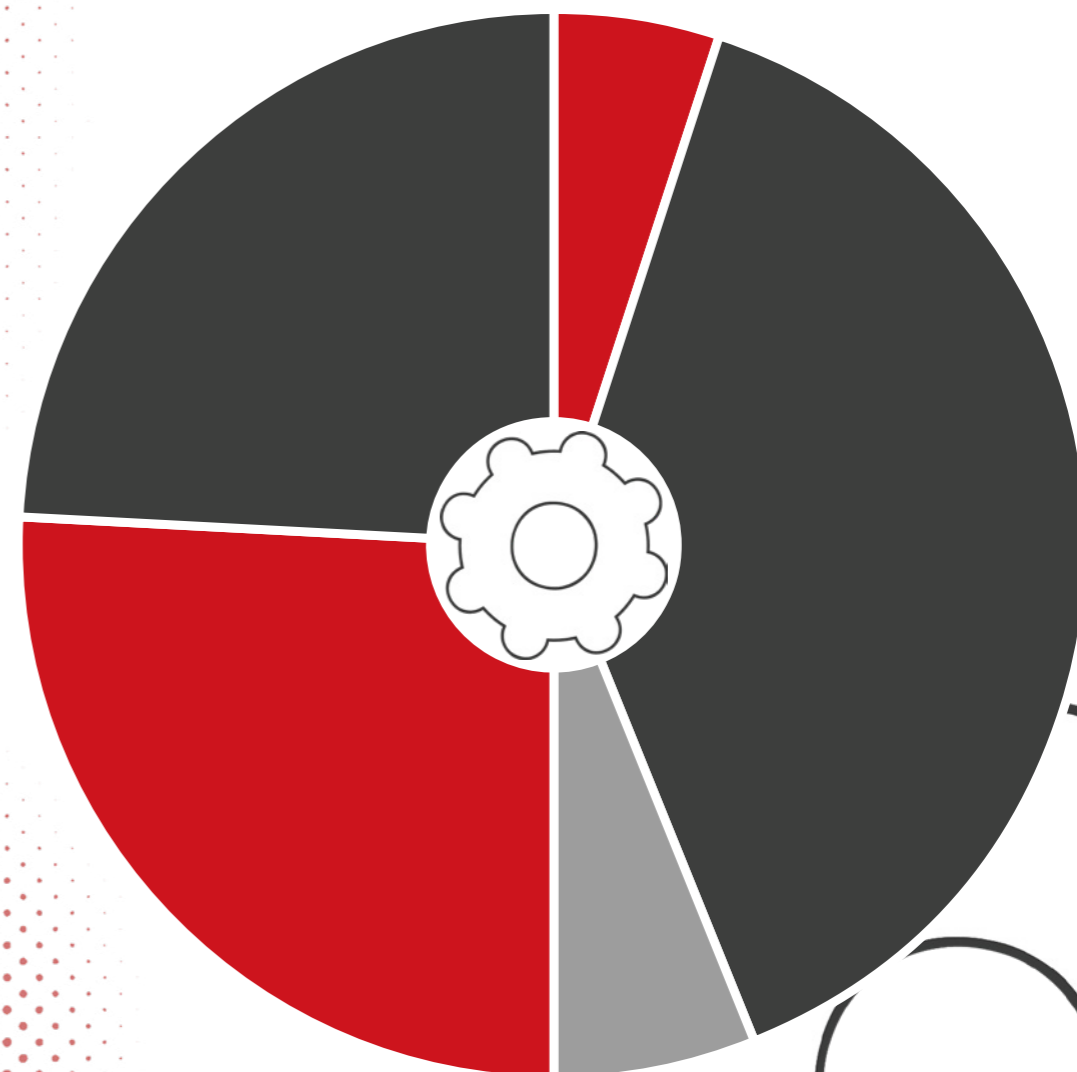
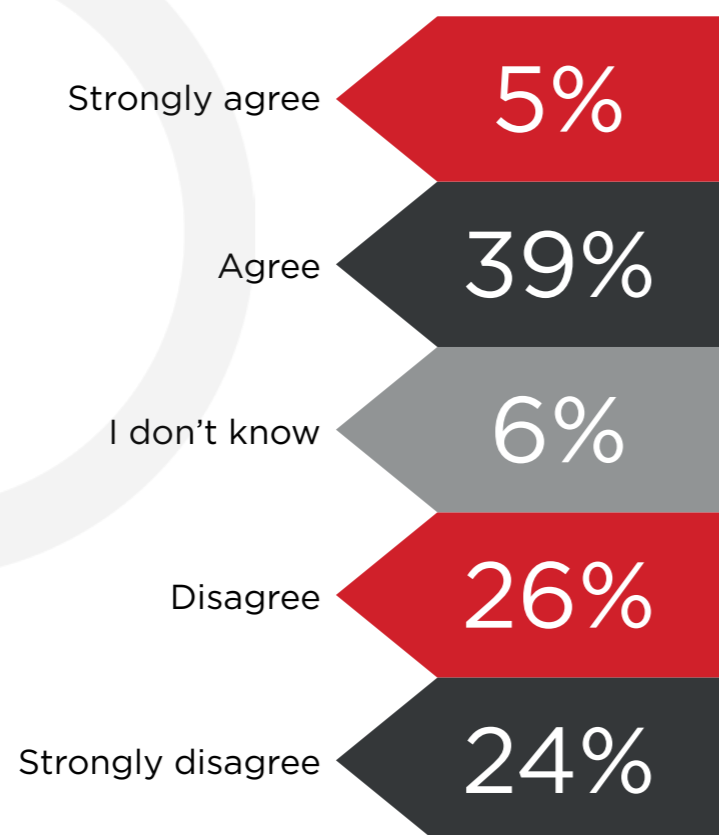
QUESTION 13

How would you describe your organisation's readiness to deploy automation solutions?



QUESTION 14

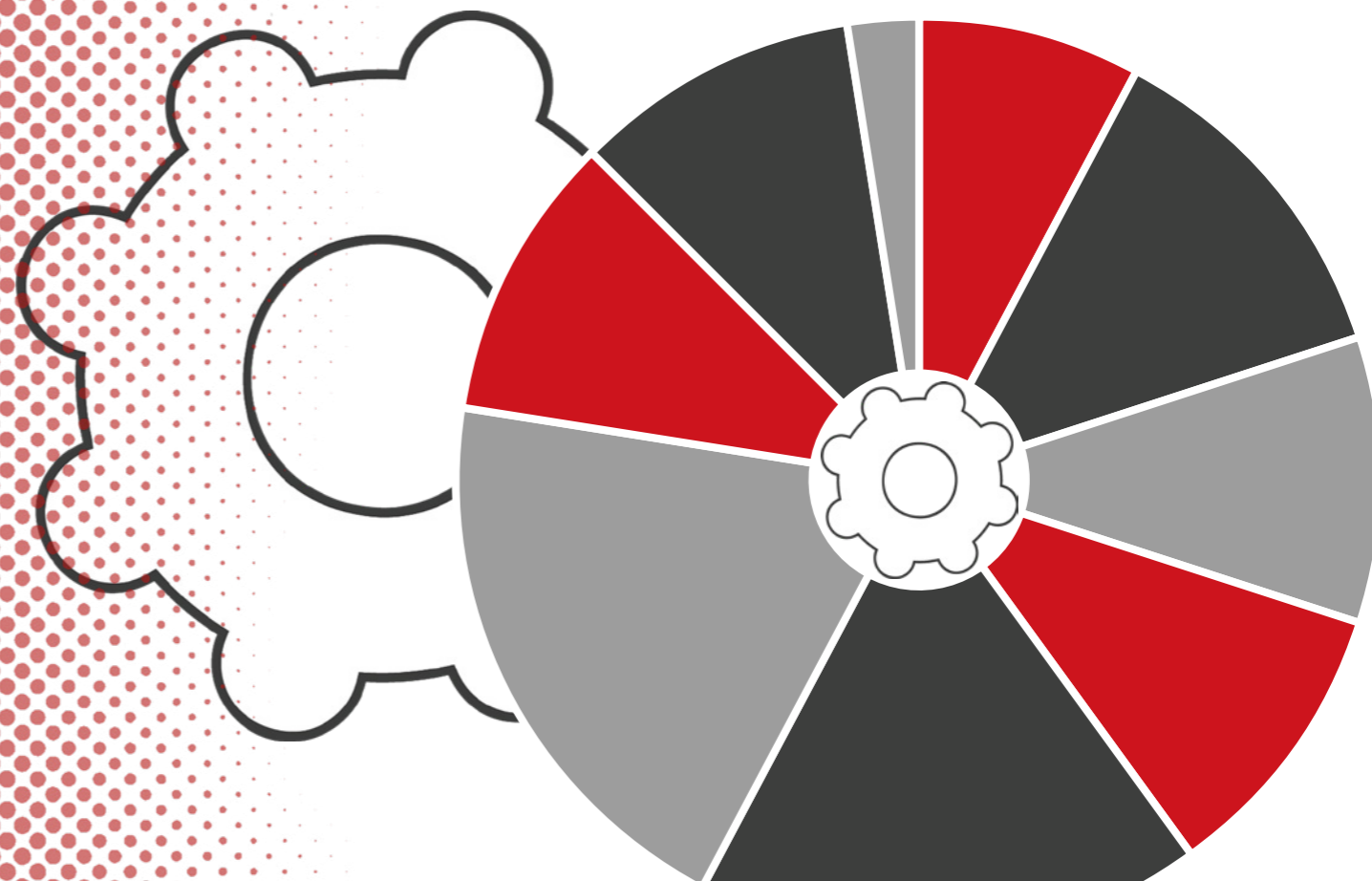
How far do you believe automation will enable you to achieve your long-term business goals?





QUESTION 15

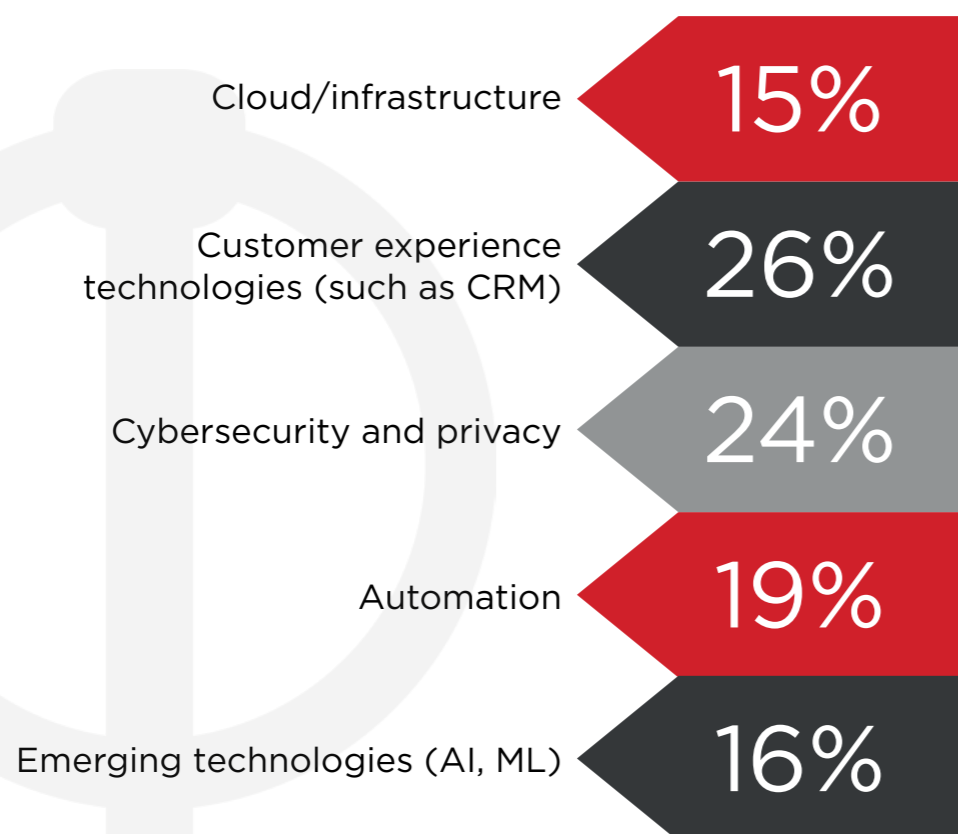
What are the priority areas for automation?



KEY FINDINGS

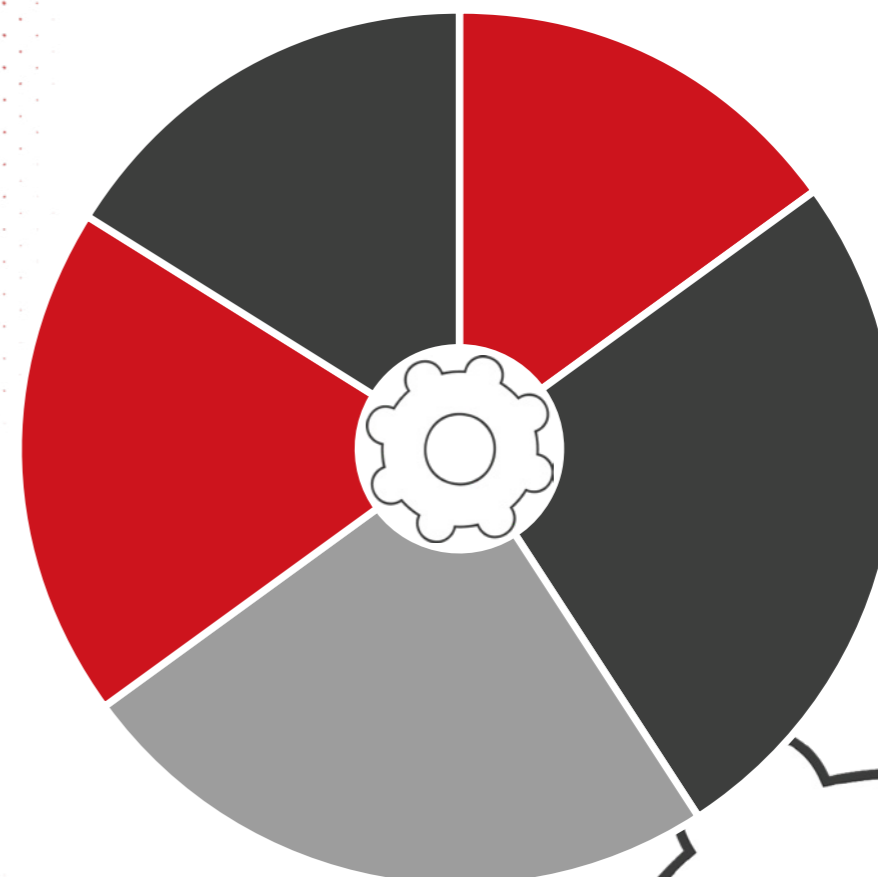
It's hard to read or watch the news anymore without seeing AI or automation mentioned in some way. From job adverts to robotics, AI is becoming hard to ignore.

When asked how organisations would describe their readiness to deploy automation solutions, around 50% said they were considering deployment of automation solutions, with 24% already in the process of doing so. More than 40% of respondents agreed that automation would enable them to achieve their long-term business goals, but 50% were not convinced about this which indicates there is still an important role for more traditional tools.



QUESTION 16

What are your top two technology investment areas over the next 12 months?



KEY FINDINGS

Looking ahead, the C-suite has a range of competing priority areas for technology investment. Digital roadmaps look different for every organisation due to differing strategic objectives, so it is no surprise to see the vote split in this way. It is clear however, that the key areas of customer experience, cybersecurity, automation and infrastructure modernisation will each be an important element of business' digitalisation strategies.

REPORT SUMMARY

The survey highlights some of the challenges and considerations for the C-suite as they strive to use technology to enable strategic business goals to be met.

The Middle East is a region known globally for its innovation, in many cases leading the way in pioneering new technologies and tools to streamline processes and enable efficiencies.

Our findings show that, despite some economic uncertainty, organisations are still prioritising digital investments, with 60% of respondents stating their business had increased investment in Digital Transformation projects in the last 12 months. Chief among their business goals through digitalisation was employee productivity, alongside improved customer experiences and faster time to market.

Cloud adoption is on the rise, with more than half of respondents stating they were using cloud in some capacity – whether that be private (19%), public (5%), multi (15%) or hybrid (16%). And, looking ahead, cloud will be a major part of most organisations' digital strategies.

The findings highlight that organisations will continue to digitalise, with likely investment in cloud to achieve business goals of increased employee productivity, faster time to market and improved customer experiences.

Legacy infrastructure is one challenge to cloud migration and organisations are seeking technology partners to help overcome obstacles such as this. They require partners that offer affordable services, are based in-country, secure, and have a proven track record.

Organisations require robust cybersecurity strategies and tools to safeguard against the increased threats facing their expanded digital touchpoints, particularly given the rise of

hybrid working options. While the survey findings do not show a high level of confidence that cybersecurity developments are keeping pace with this modern way of working, C-suite respondents did assert a decent level of assurance that their organisations were generally protected.

In addition, just over half of respondents thought current security measures at their organisations were strong enough when implementing new ICT projects.

Finally, with automation and AI firmly on the agenda of most enterprises – as well as public sector organisations – we sought to understand how our respondents' organisations were approaching it.

Around 50% said they were considering deployment of automation solutions, with 24% already in the process of doing so. However, half of respondents were not convinced automation would ultimately enable them to achieve their long-term business goals and, while automation will clearly play a central role in organisations' digital strategies, there will still be a requirement for more of the traditional tools that have been part of technology stacks for some time.

In summary, organisations in the region are continuing to rapidly digitalise, adopting cloud tools to aid this process and seeking partners to overcome challenges.

There is some way to go to build confidence across the entire C-suite that cybersecurity is robust enough to withstand the threats introduced by remote and hybrid working strategies, while automation is on the agenda for many organisations as they plan their digital investments for the future.

By



Jess Abell,
Director, Strategic Content,
Lynchpin Media

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