

2017 CIO Agenda: A China Perspective

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From Inside to Outside: The Next Digital Revolution

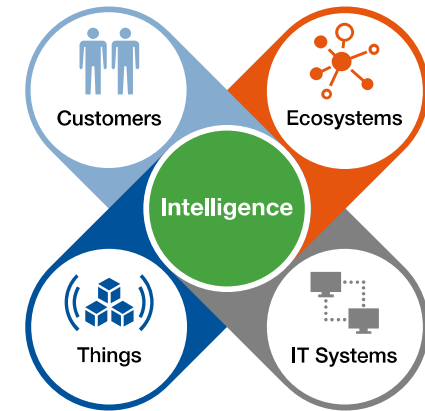
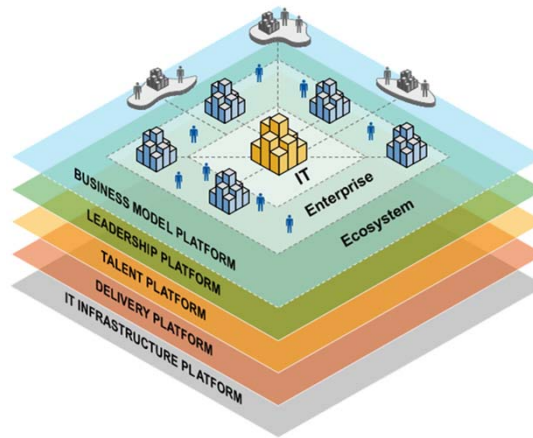
Information and Technology



Value and Risk



Leadership and Culture



Flipping to Digital Leadership

Building the Digital Platform

Seizing the Digital Ecosystem Opportunity

2,598 CIOs

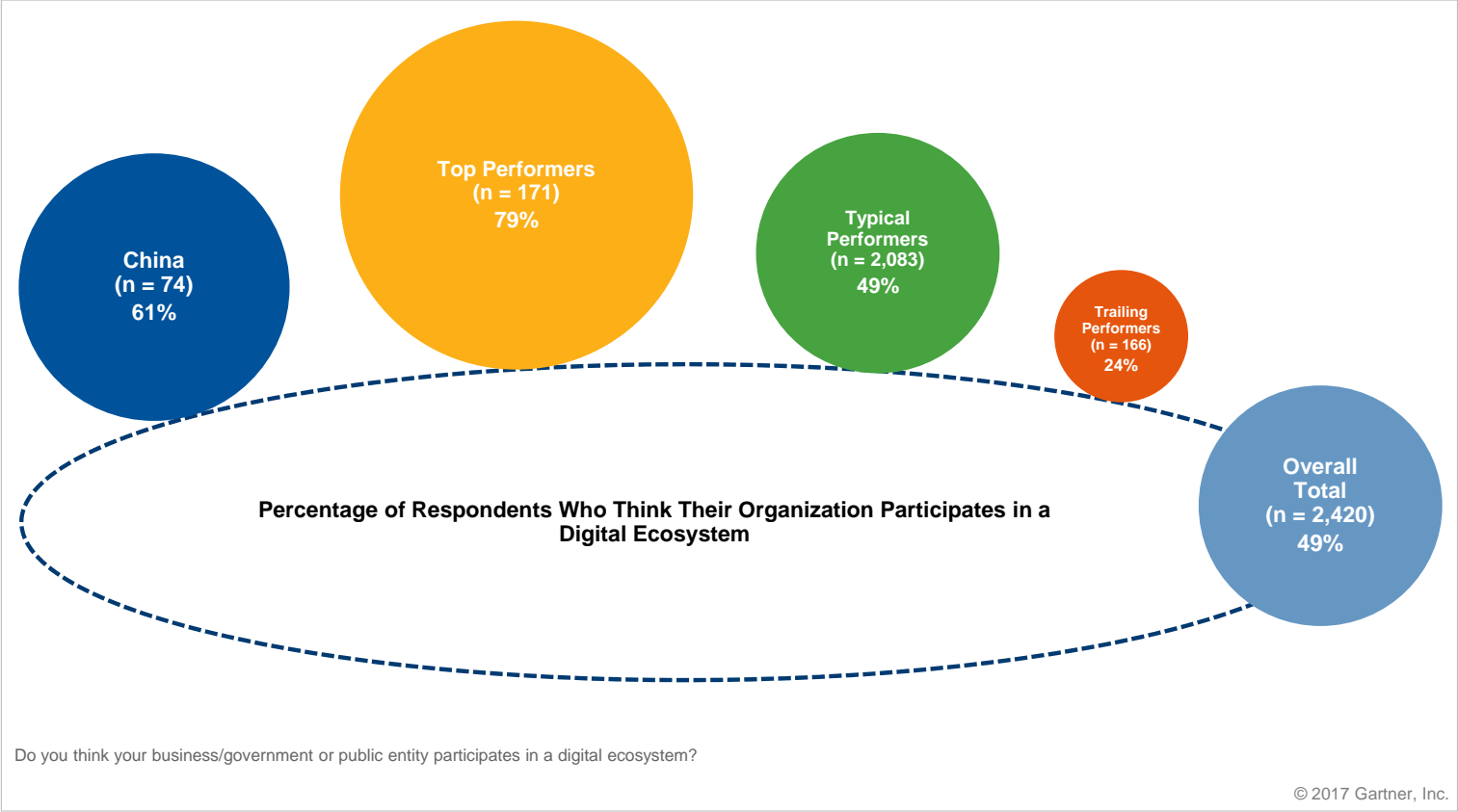
93 Countries

\$9.4T Revenue

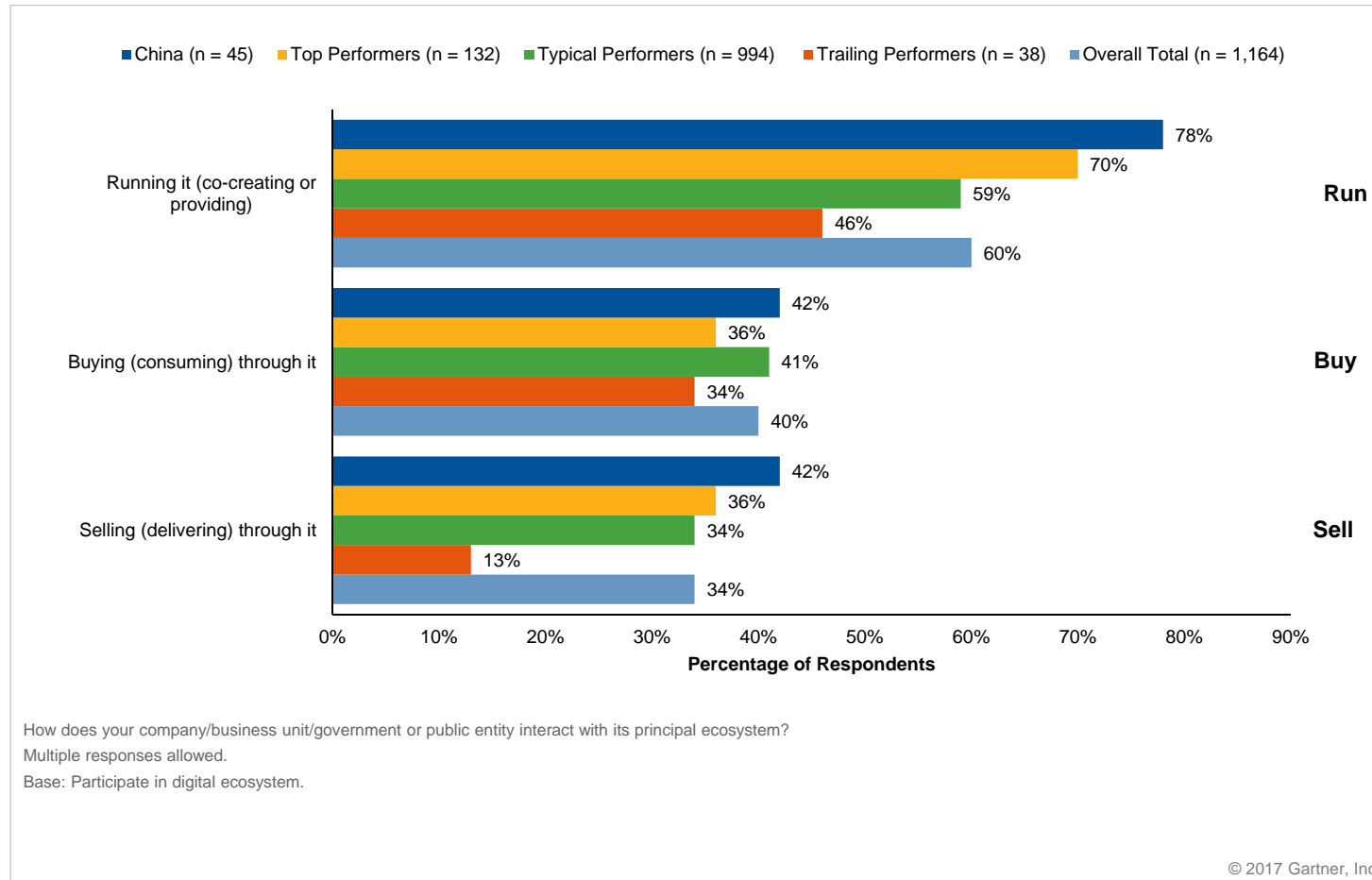
\$292B IT Spend

Gartner

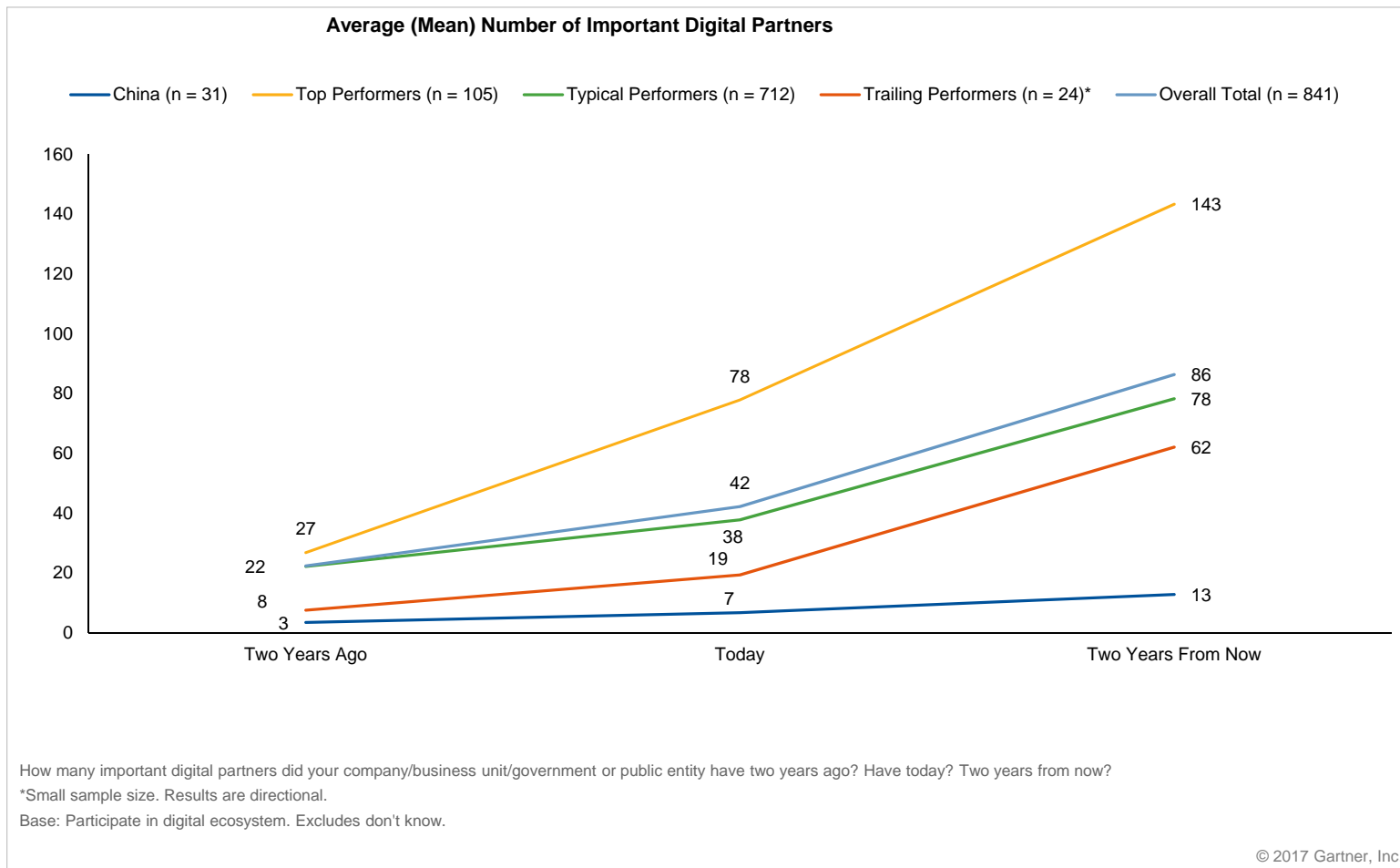
More Chinese Enterprises Are Participating in Digital Ecosystems



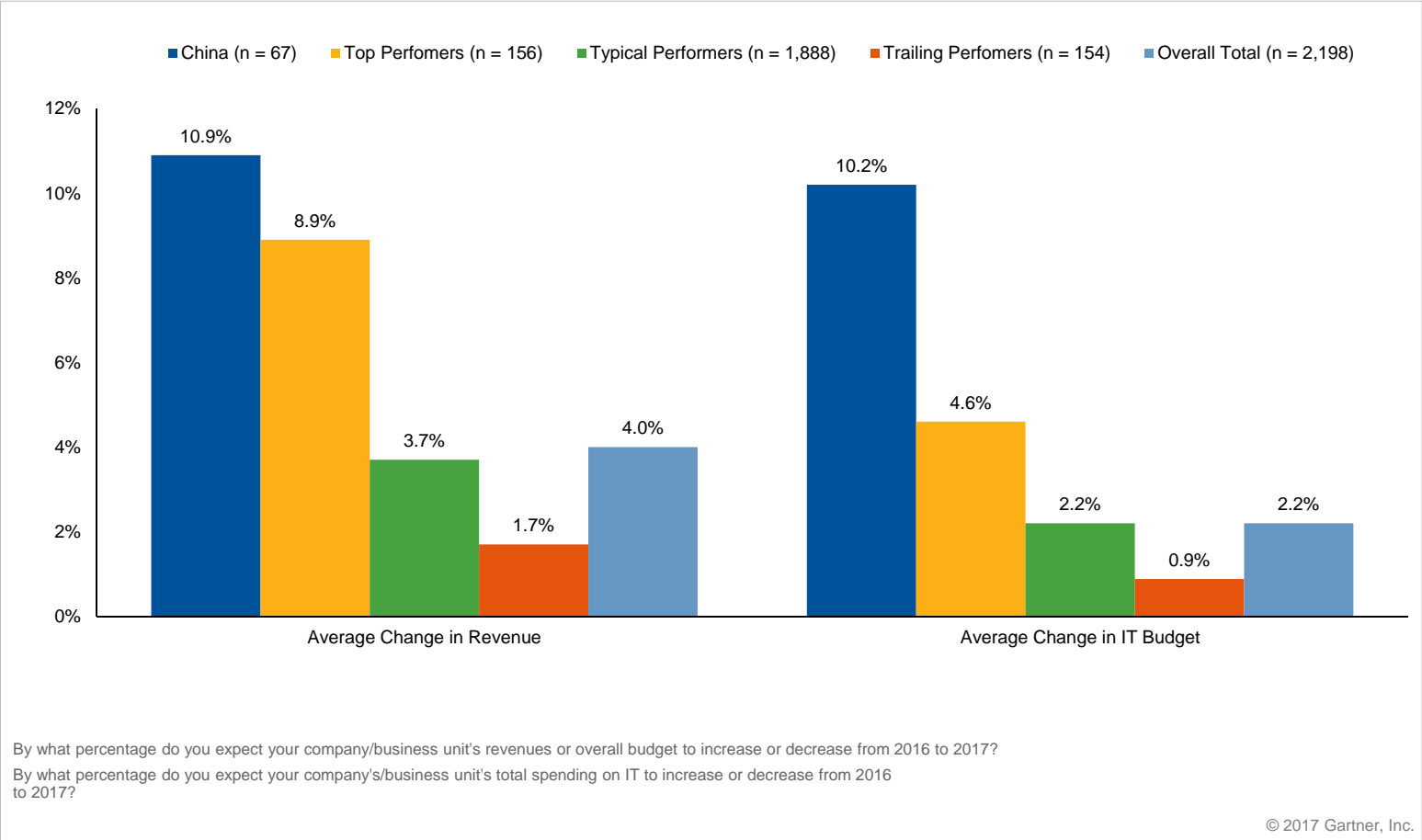
... And Running Ecosystems



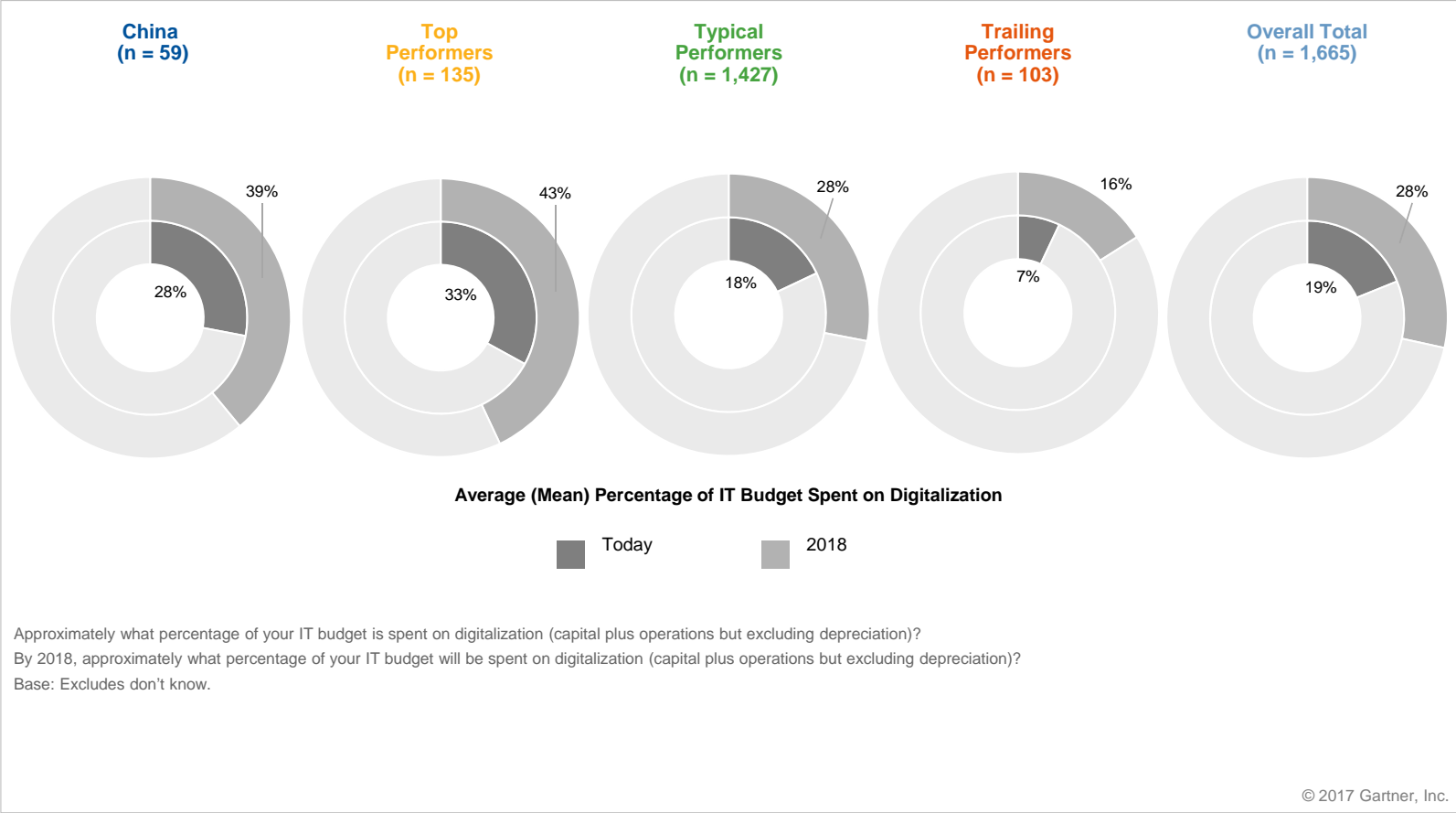
... But Having Challenges in Number of Partners



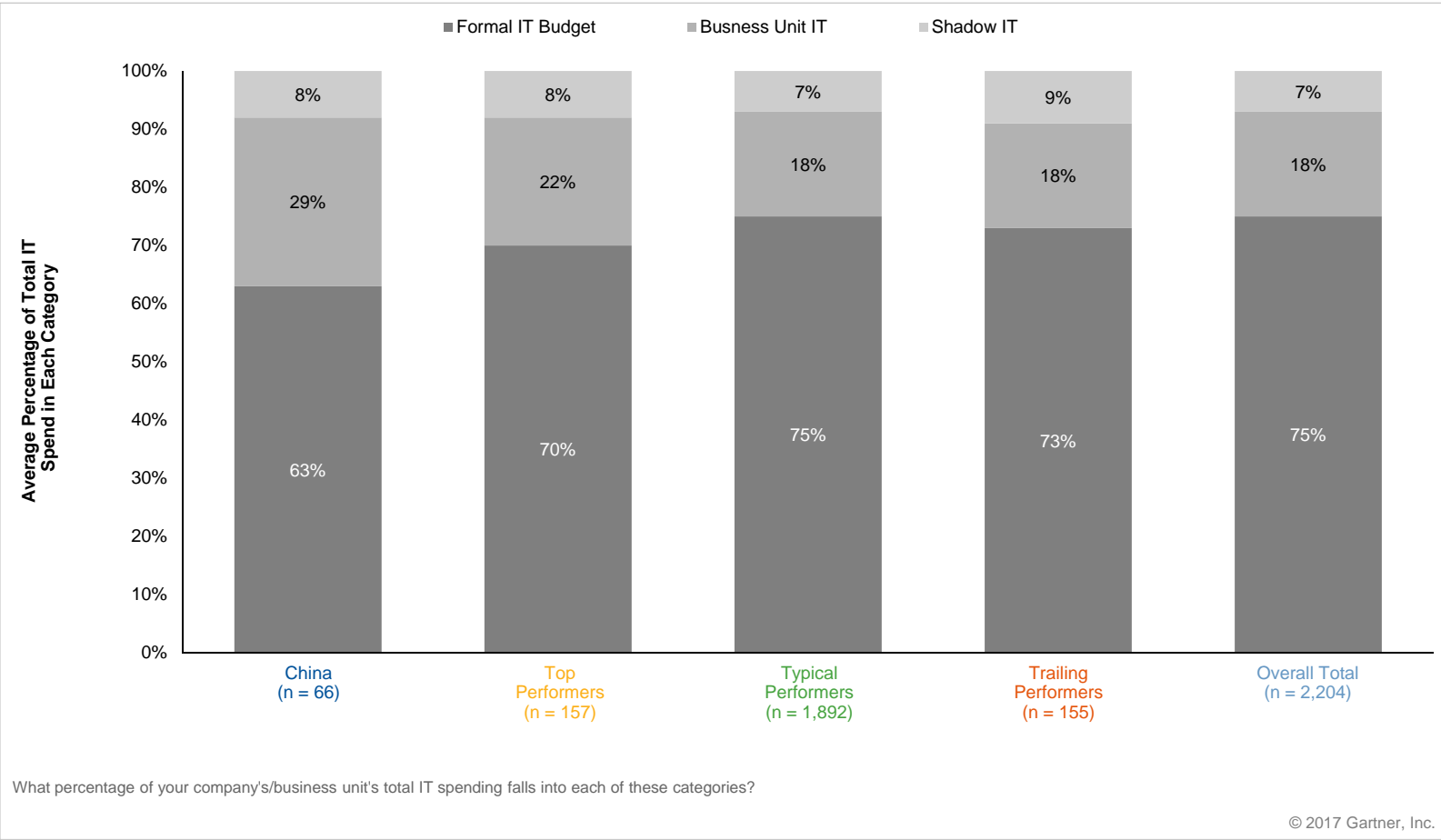
Expecting More Increase of IT budget



Allocating More IT Budget in Digitalization



Less Formal IT Budget and More Business Unit IT Budget



Rising to the Digital Ecosystem Challenge



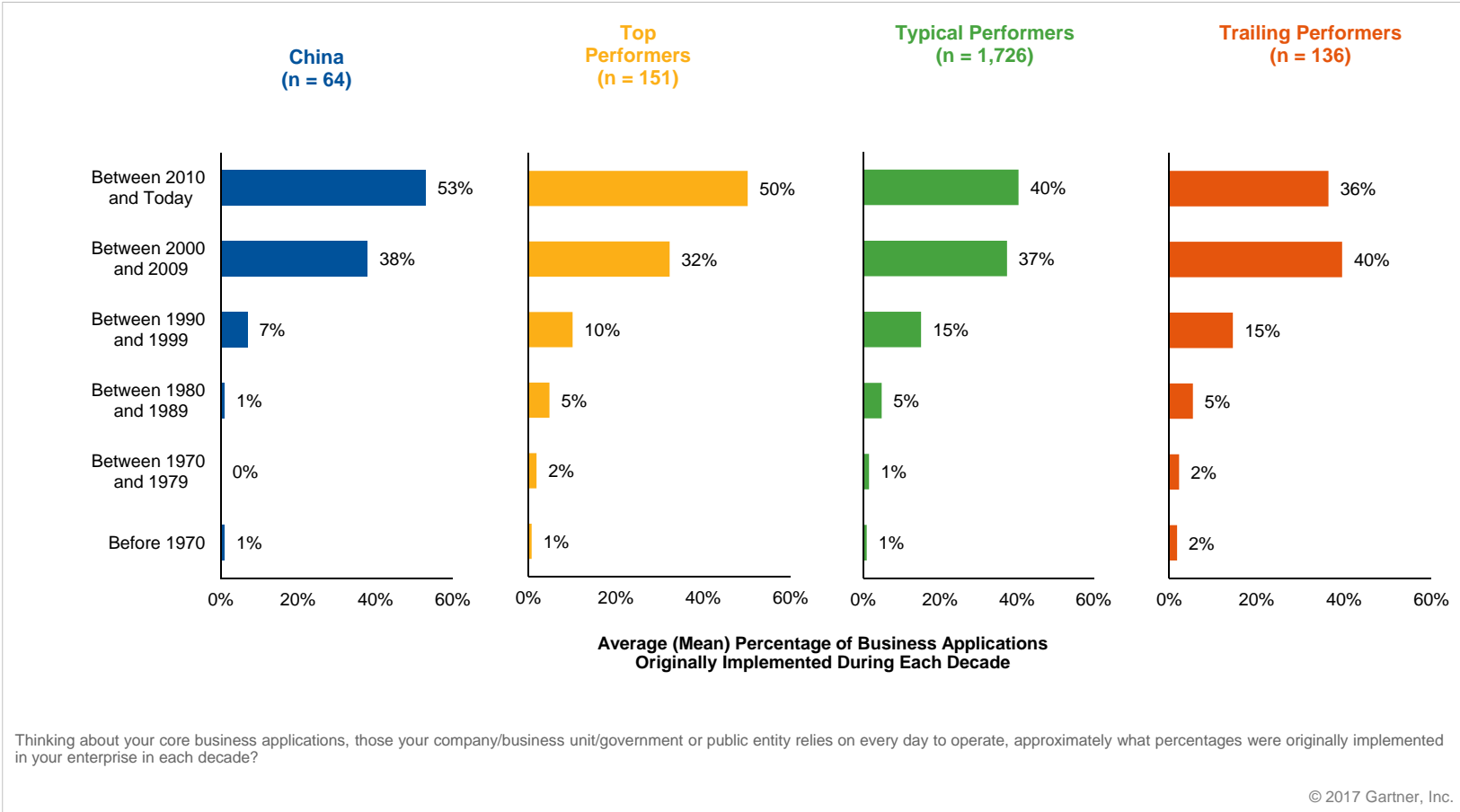
Rising to the Digital Ecosystem Challenge: Technology

Master digital-ecosystem-ready leadership

Create a digital-ecosystem-ready organization

Extend your **technology core** to be digital-ecosystem-ready

Application Systems are Much Newer



Technology Investment Priorities

Technology Areas That Were Mentioned Within Top Three Most Often by Overall Respondents	China (n = 74)	Top Performers (n = 178)	Typical Performers (n = 2,165)	Trailing Performers (n = 171)	Overall Total (n = 2,584)
BI/Analytics	45%	47%	38%	31%	38%
Cloud Services/Solution	41%	34%	26%	29%	27%
Infrastructure and Datacenter	19%	20%	22%	27%	22%
Enterprise Resource Planning	22%	8%	22%	30%	22%
Cyber/Information Security	8%	13%	16%	20%	17%
Digitalization/Digital Marketing	11%	20%	17%	8%	16%
Mobility and Mobility Applications	16%	16%	14%	16%	14%
Networking, Voice and Data Communications	4%	8%	12%	13%	11%
Customer Relationship Management	4%	6%	10%	7%	10%
Industry-Specific Applications	8%	10%	9%	6%	9%
Internet of Things	11%	7%	4%	2%	4%

Percentage of Respondents

Please indicate the top three technology areas where your company/business unit/government or public entity will be spending the highest amount of new/discretionary funding in 2016.

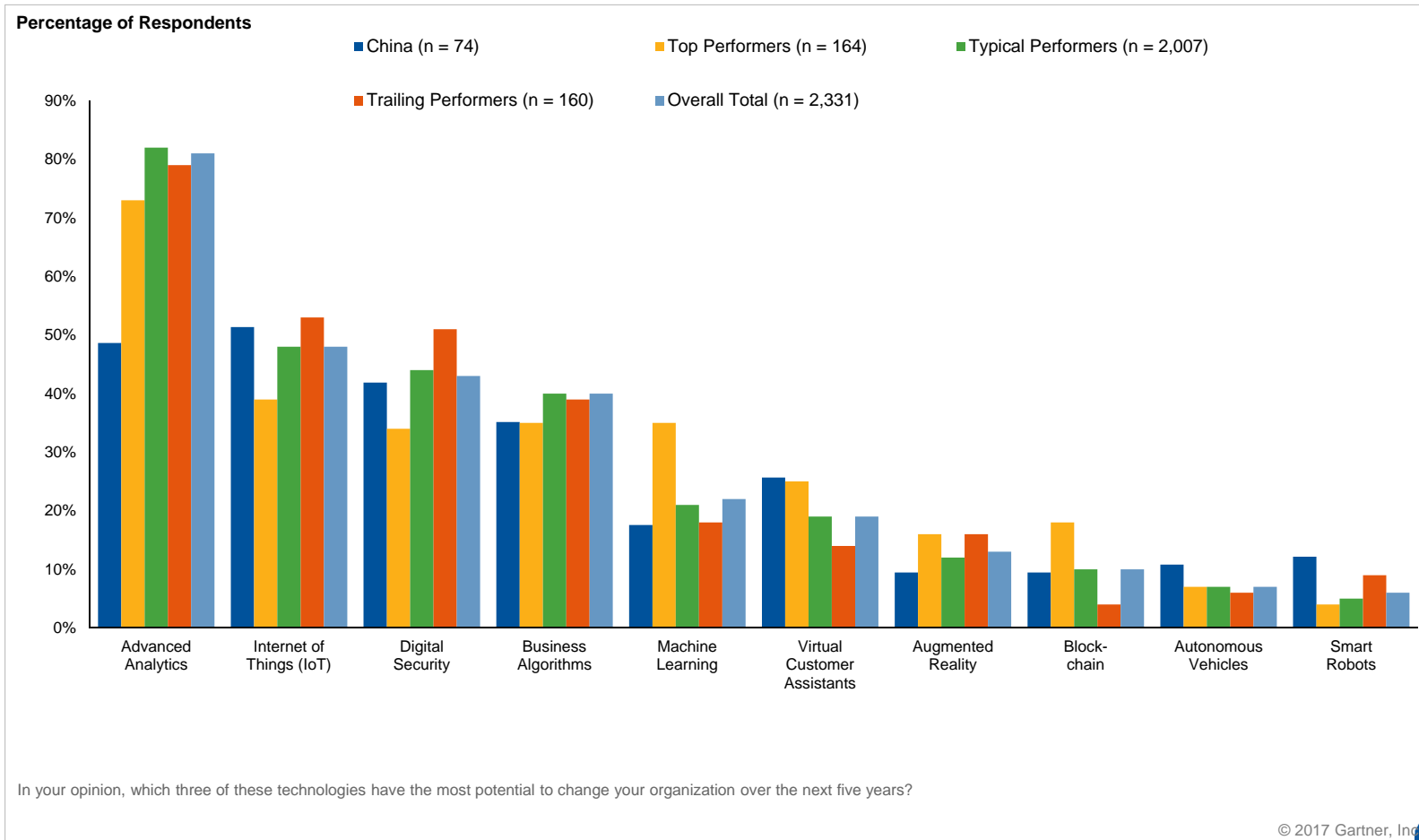
Up to three responses allowed.

Coded open-text responses.

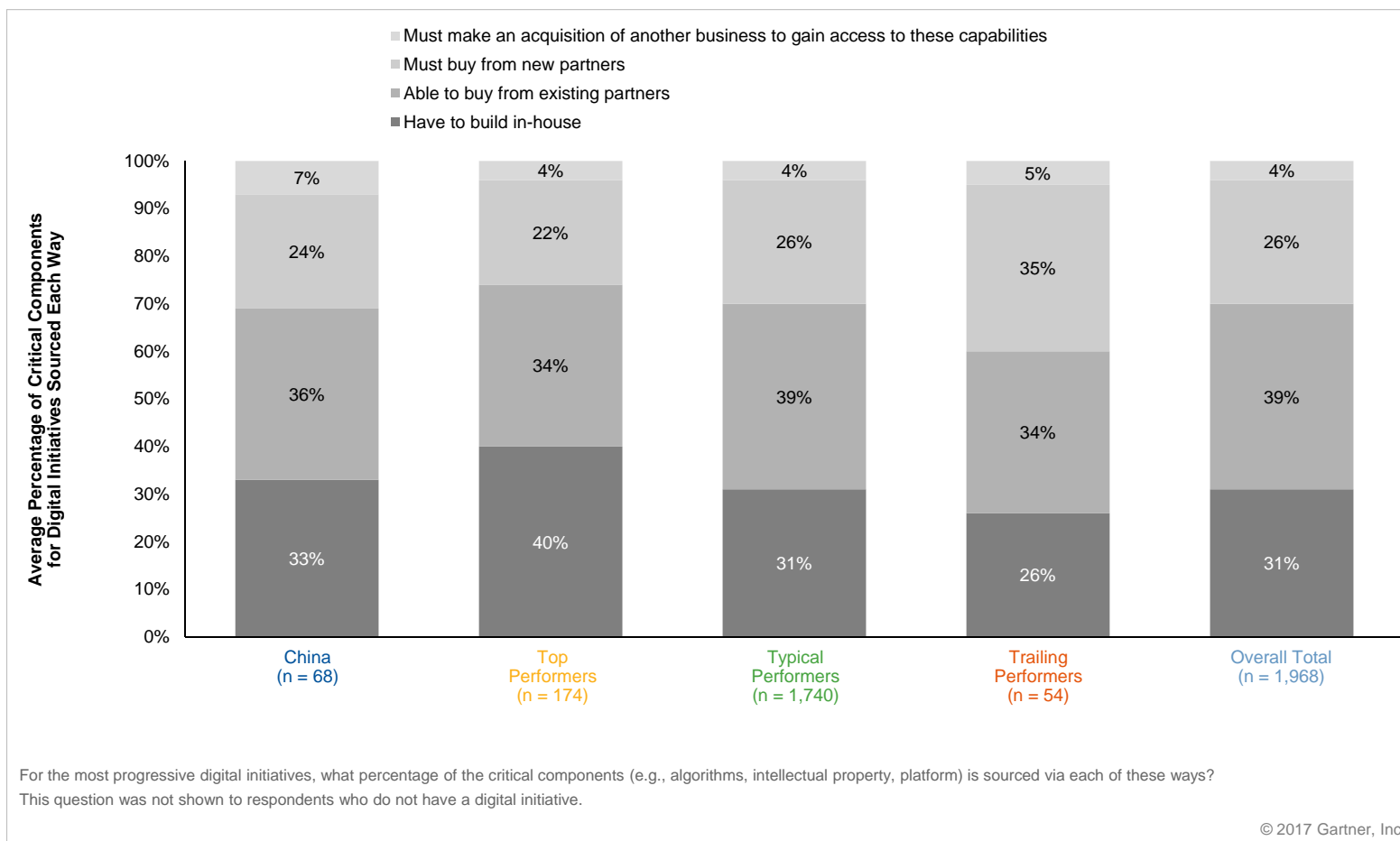
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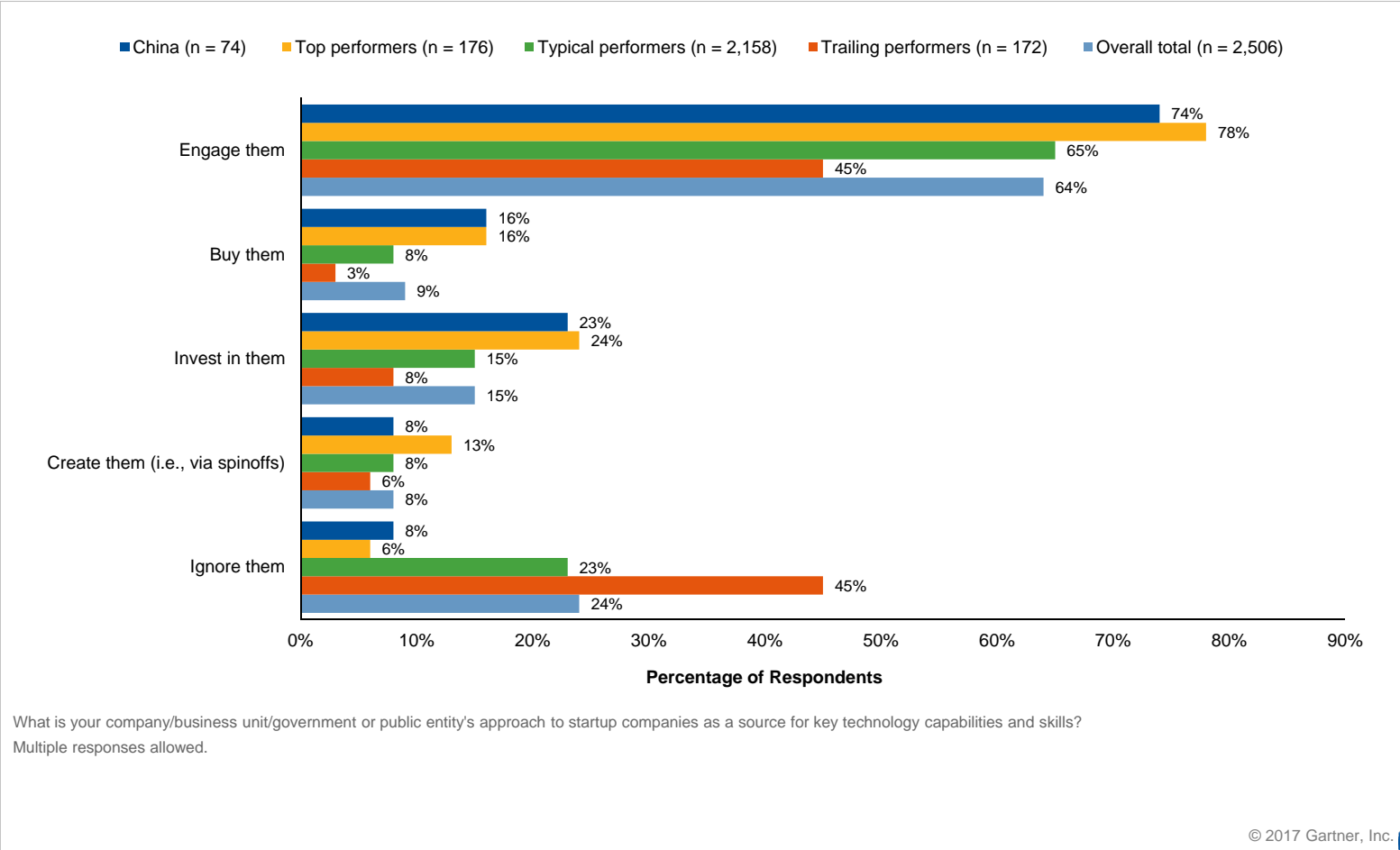
Technologies With The Most Potential in Next Five Years



Sourcing Strategy For Critical Components of Digital Initiatives



Approach to Startup Companies



Rising to the Digital Ecosystem Challenge: Organization



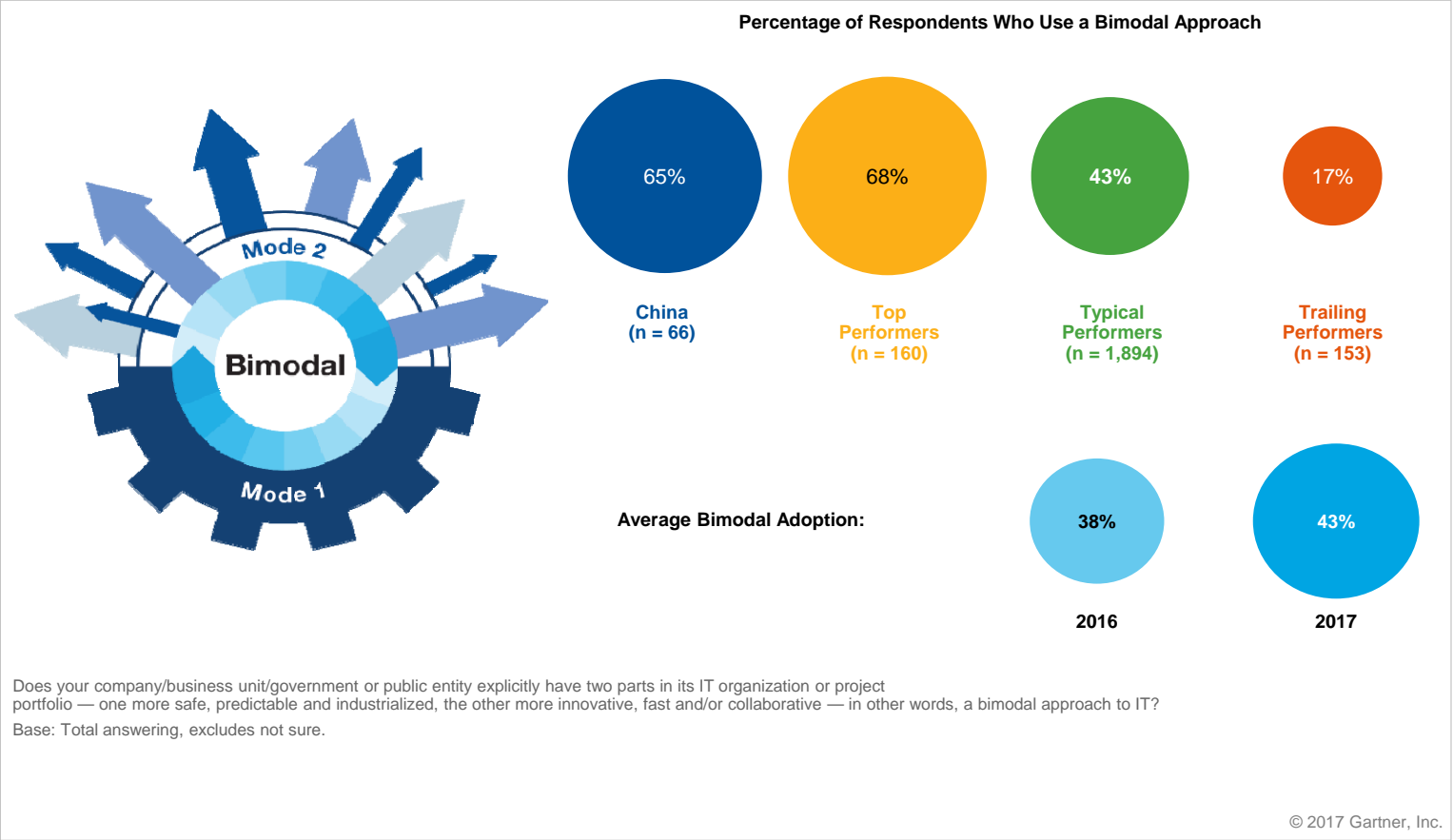
CIO's Biggest Barriers

Showing Top Nine Responses for Overall Respondents	China (n = 71)	Top Performers (n = 162)	Typical Performers (n = 1,976)	Trailing Performers (n = 160)	Overall Total (n = 2,299)
Skills/Resources	25%	27%	26%	22%	26%
Funding/Budgets	10%	19%	17%	16%	17%
Management Sponsorship/ Understanding/Relationships	20%	10%	8%	16%	8%
Culture/Structure of Organization	6%	4%	8%	10%	8%
Technology Challenges (Legacy, Security, etc.)	10%	8%	5%	3%	5%
Lack of Leadership/Planning/ Strategy	7%	4%	5%	6%	5%
Capacity/Willingness to Change	1%	2%	5%	4%	4%
IT/Business Alignment	15%	6%	5%	3%	4%
Business Value of IT	4%	2%	4%	7%	4%

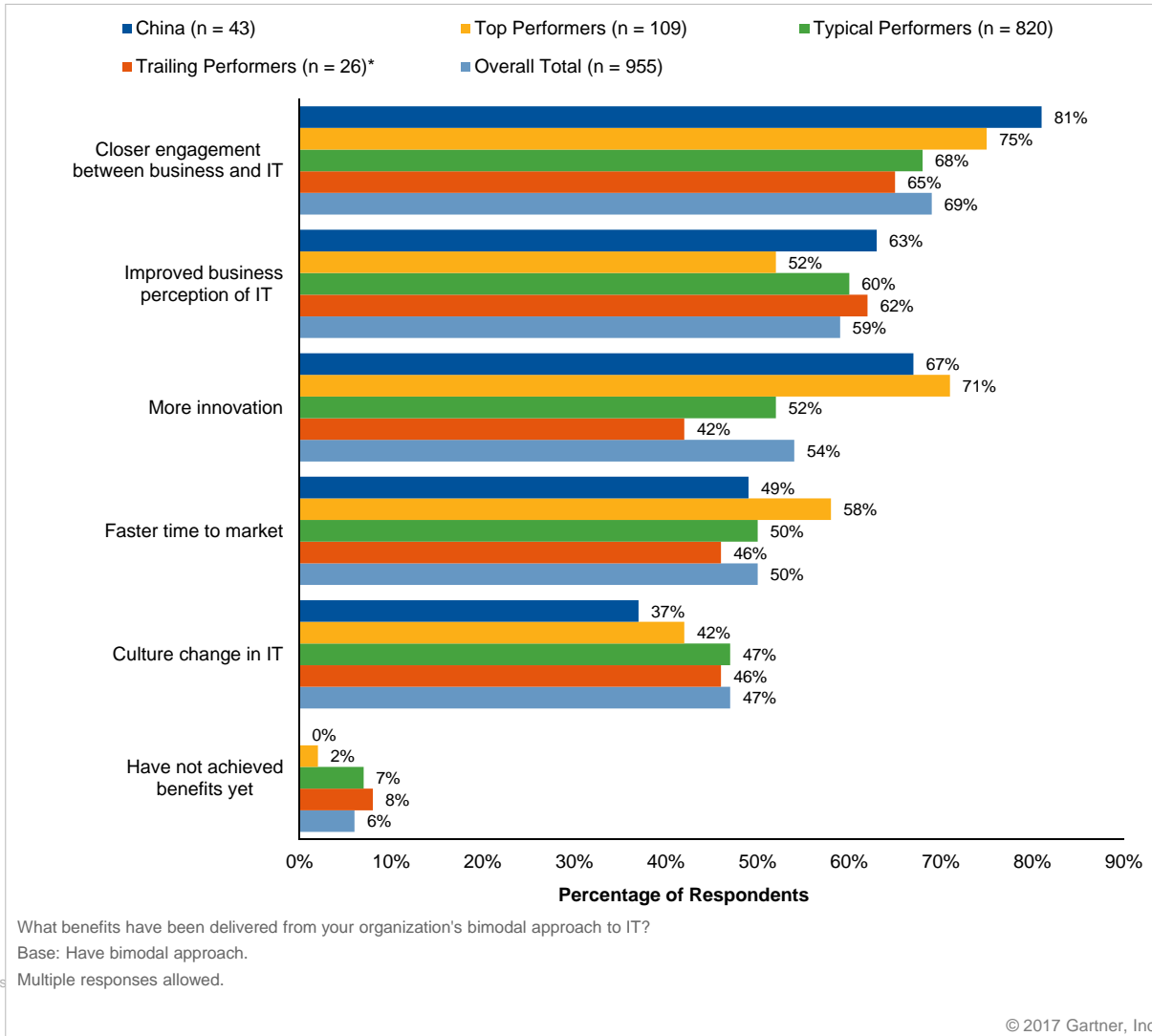
Percentage of Respondents

What is your biggest barrier to achieving your objectives in your role?
 Coded open text responses.

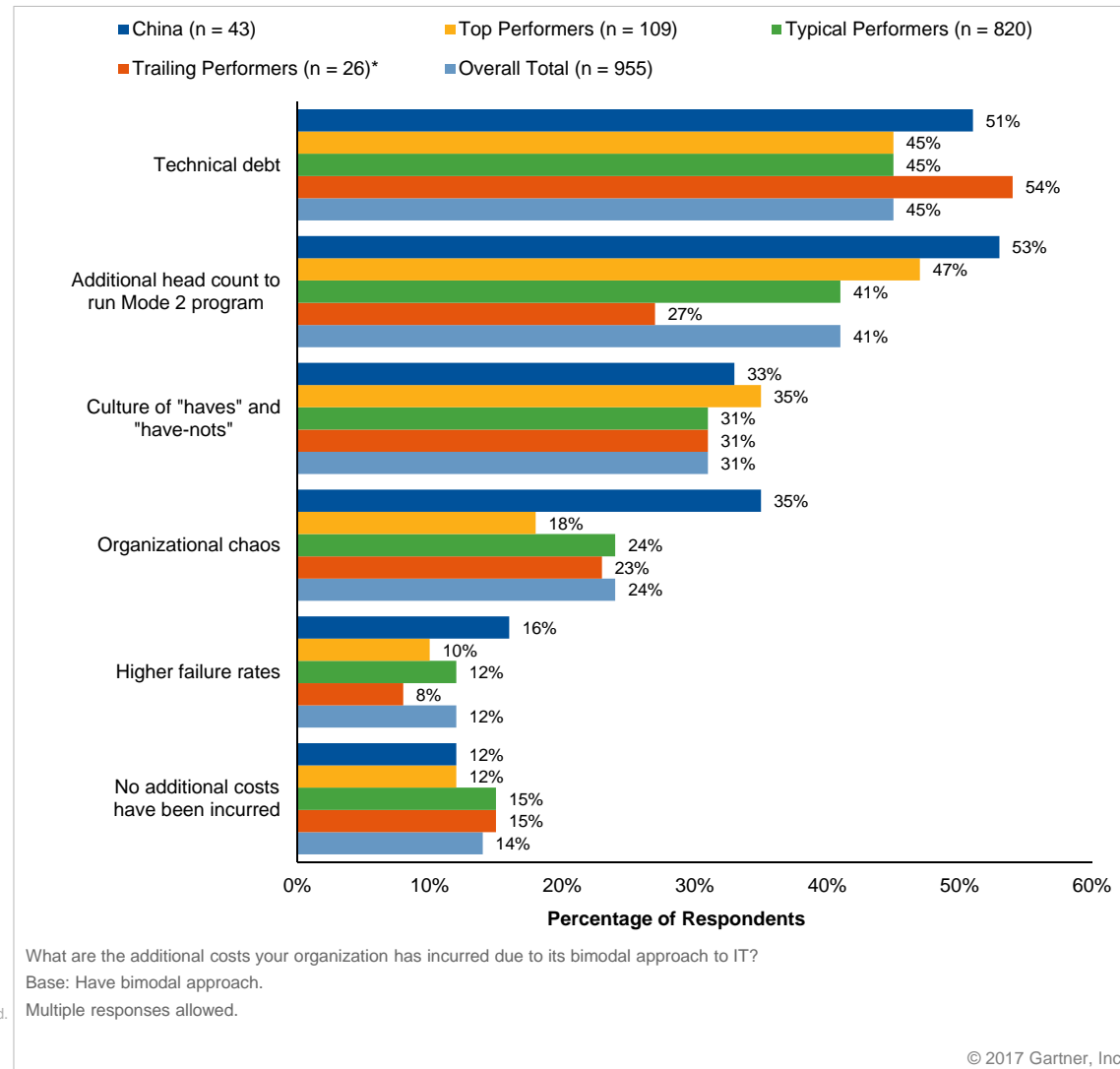
Bimodal IT Adoption Is Increasing



There are Benefits of Bimodal



... And Costs



Rising to the Digital Ecosystem Challenge: Leadership



Strategic Business Priorities

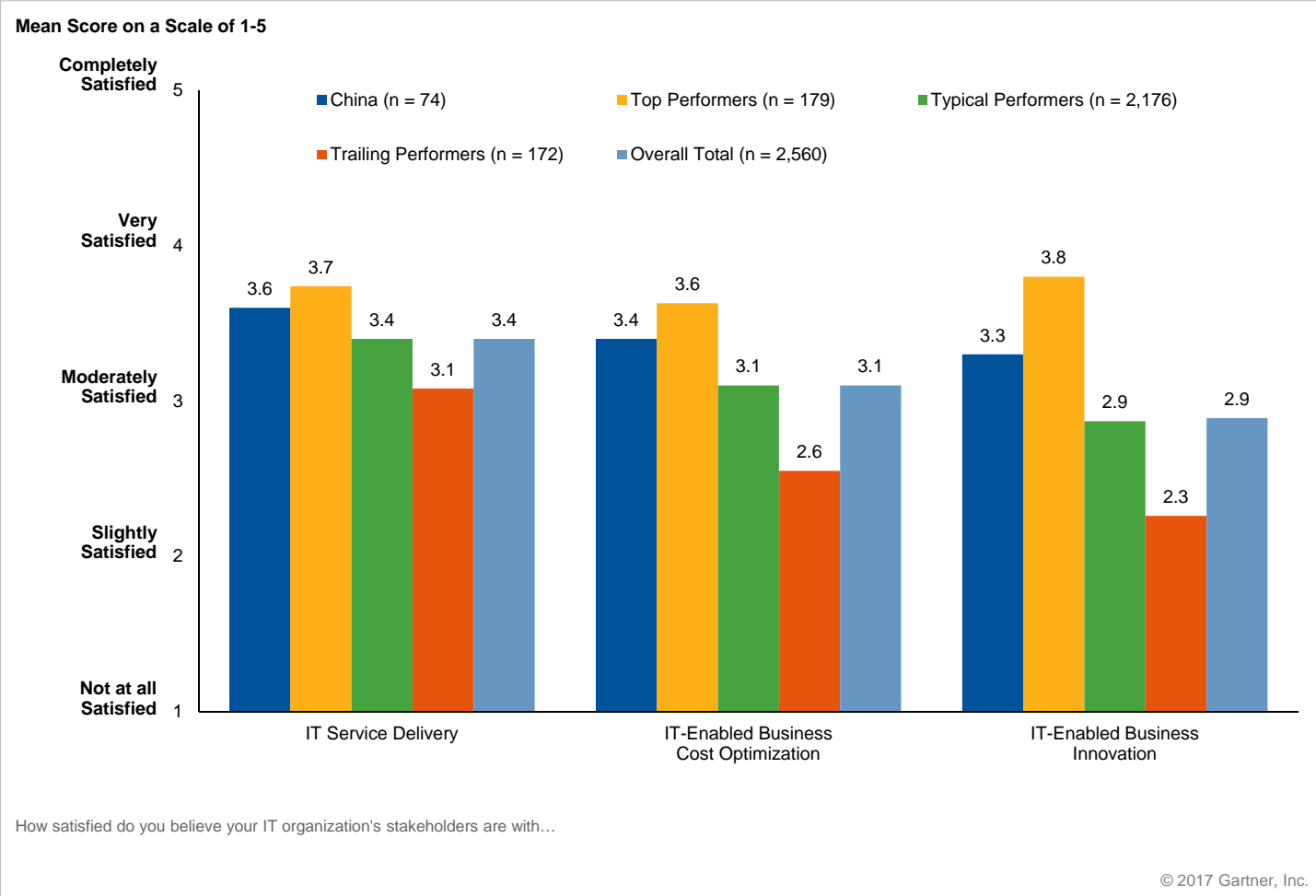
Priorities that were mentioned within top three by more than 10% of overall respondents	China (n = 72)	Top Performers (n = 177)	Typical Performers (n = 2,165)	Trailing Performers (n = 171)	Overall Total (n = 2,581)
Technology Initiatives/Improvements	26%	26%	25%	22%	25%
Growth/Market Share	15%	28%	21%	24%	22%
Customer Focus	8%	22%	22%	11%	21%
Digital Business/Digitalization	18%	28%	20%	6%	19%
Corporate/M&A/New Business/Consolidation	28%	18%	16%	23%	17%
Innovation, R&D, New Products/Services	22%	20%	13%	9%	13%
Operations Improvement/Efficiency/Excellence	19%	14%	12%	12%	12%
Analytics/Data/Information	13%	18%	12%	5%	12%
Cost Optimization/Management/Reduction	4%	6%	12%	20%	12%
Quality/Performance/Market Leader	14%	5%	11%	12%	11%
Security, Safety and Risk	7%	7%	11%	9%	11%

Percentage of Respondents

Please tell us about your government or public entity's/business unit's/company's top three strategic business priorities for the next two years (2016/2017).
 Up to three responses allowed.
 Coded open-text responses.



Perceptions of Stakeholder Satisfaction



Recommended Gartner Research

- ▶ [The 2017 CIO Agenda: Seize the Digital Ecosystem Opportunity](#)
Andy Rowsell-Jones, Tomas Nielsen, Jan-Martin Lowendahl, Chris Howard (G00317427)
- ▶ [2017 CIO Agenda: A China Perspective](#)
Owen Chen, Changhua Li (G00318402)
- ▶ [Develop IT Strategy for China's 13th Five Year Plan](#)
Kevin Ji, Tina Tang, Owen Chen and Others (G00316855)
- ▶ [Chinese CIOs Need Strengthen Their Relationship With their Business](#)
Owen Chen (G00300723)
- ▶ [Supporting Digital Business in China](#)
Owen Chen, Partha Iyenger and Jeffrey Cole (G00291001)
- ▶ [What Chinese CIOs Should Do With 'Internet Plus'](#)
Owen Chen (G00280372)
- ▶ [Chinese CIOs Must Take a Balanced and Holistic Approach to Building Bimodal IT](#)
Owen Chen (G00276948)



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Thank You!

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