

EMEA RESEARCH REPORT 2021

Rapid Agility

How C-level executives and IT Leaders have used data agility to survive in challenging times.



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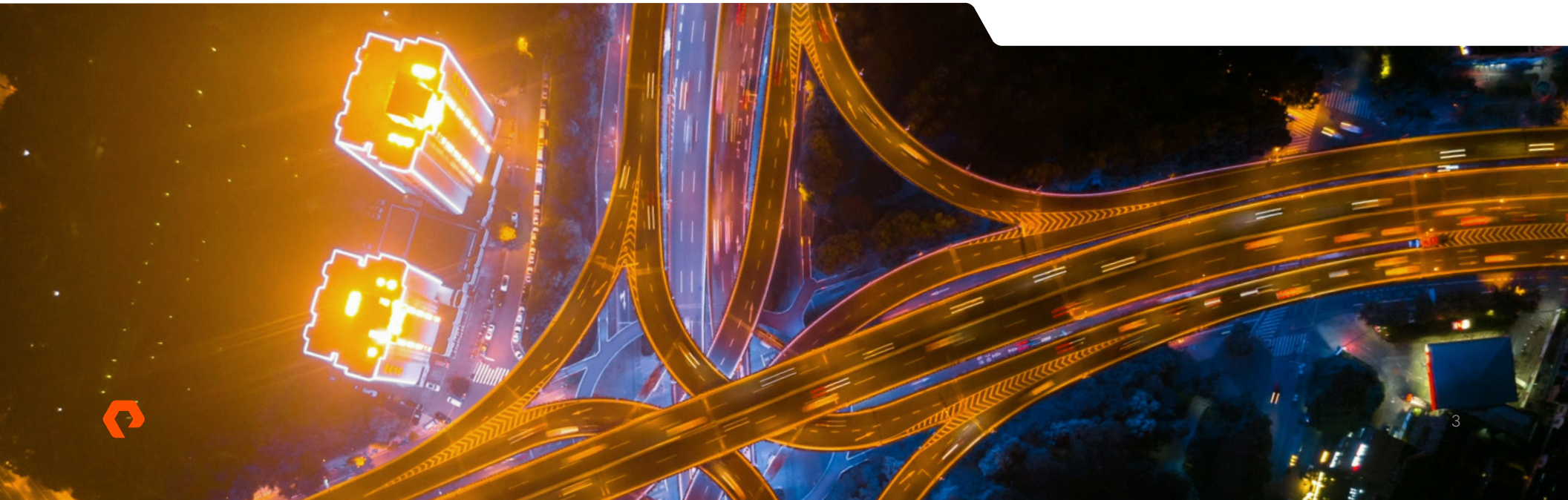


Executive summary

When the pandemic first hit, organisations across sectors and in every country were impacted by unthinkable levels of disruption. In response, operations moved from bricks and mortar to digital, demand for goods and services drastically changed, supply chains buckled, and many organisations switched into problem solving mode.

Initially, navigating to safer ground was key – and it was made possible because those organisations who managed it were powered by data. Their data agility enabled them to put data to work in new and sometimes highly inventive ways to help them weather the storm. Now, as the economy bounces back, organisations have a greater, renewed need for this rapid agility to enable and sustain transformation, turning opportunities into advantage.

Against this backdrop, Pure Storage commissioned research to explore how IT leaders are feeling currently and identify their pain points and priorities as they begin to regroup after a highly challenging period. The research examines how rapid agility can help address the perennial chasm between IT and business needs, as well as the role of a modern data infrastructure in supporting growth and minimising risk as businesses move from survival to revival mode.



Key stats and themes from the research include the following:

Acknowledging business and IT alignment as a longstanding issue

- 78% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months.
- IT leaders are most excited and motivated by knowing that IT has proven its value (50%), by driving digital transformation and leading change efforts for the organisation (50%) and by IT having a strategic voice in the organisation (49%). Only 1 in 5 (20%) say the technology itself is what excites and motivates them.
- IT leaders are most frustrated by a lack of recognition of effort and results from the IT team in the last 12 months (43%), pressure to simultaneously innovate and cut costs (41%) and competing priorities/reactive 'firefighting' (39%).
- The alignment between IT leaders and the business is improving – from an average 48% alignment two years ago, to a 64% alignment now.
- When thinking about how the business was able to respond to the pressures of the pandemic, 34% considered technology infrastructure to be very robust across the business in supporting their needs and 36% considered their processes and culture to be very agile across the business in supporting their needs.

RESEARCH METHODOLOGY

This report is based on research among 504 IT leaders in organisations across the UK, Germany, France, Spain, Italy, the Netherlands and Switzerland with 500+ employees. The research was conducted in April/May 2021 and managed by Insight Avenue, an independent research consultancy based in the UK.



Re-evaluating priorities and accelerating agility

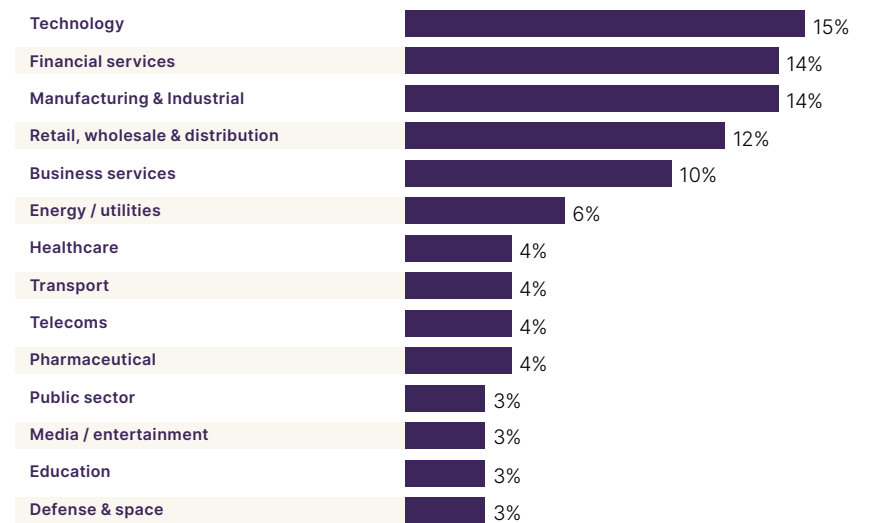
- 76% of IT leaders say that tech priorities from before the pandemic have been largely re-evaluated.
- 82% say they are moving from survival into revival mode as an organisation and 82% say rapid agility is essential for them to achieve innovation and growth.
- The top five priorities for the next 12 months are embedding and accelerating agility across the business (86%), enhancing digital experience for a remote or hybrid working future (82%), enhancing digital customer experience/optimising customer journeys (80%), optimising costs/right-sizing IT (78%) and continued acceleration of digital transformation (77%).

Healing the business-IT rift with rapid agility?

- Only 1 in 4 IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (23%). A further 45% say they are quite confident.
- The biggest barriers to rapid agility are lack of alignment between business and IT strategy (45%), data 'lockdown' or siloes in the organisation (43%) and rigid processes that thwart progress (43%). Additionally, 38% say legacy infrastructure and 37% say outdated business models and ways of working.
- 69% say that organisations are only as agile as their slowest department when it comes to data.
- The two key implications of NOT having rapid agility are increased tensions between IT and the business (52%) and increased complexity (50%). Other implications include reduced productivity (38%) and lack of innovation (35%).

Sample breakdown by country	
UK	20%
France	20%
Germany	20%
Spain	10%
Italy	10%
Netherlands	10%
Switzerland	10%

Sample breakdown by sector





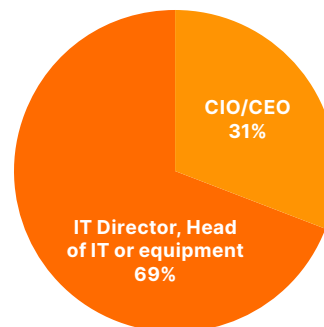
Supporting rapid agility with a modern data infrastructure

- 77% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure.
- Elements of a modern data infrastructure seen as important in supporting rapid agility include the ability to upgrade to the latest innovations easily and without penalties (83%), encryption of data at rest to mitigate the risk of ransomware attacks (81%), always-on/zero downtime (80%), the facilitation of collaboration between multiple agile teams in organisation (77%) and data technologies that are easy to implement and use (76%).
- 1 in 6 say they already have a modernised data infrastructure (16%). 59% would like to have a modernised data infrastructure within 12 months.
- Over the next two years, about half (48%) see their use of Storage-as-a-Service increasing. The most compelling benefits of flexible consumption/ as-a-service models are seen as boosting agility (54%), increased security (49%), dynamic scalability (41%) and paying only for what you use (40%).
- Priority areas for technology investment over the next two years in the wake of COVID-19 are cybersecurity including protection from ransomware attacks (49%), remote access technology/ mobility (44%), multi-cloud strategy (43%).

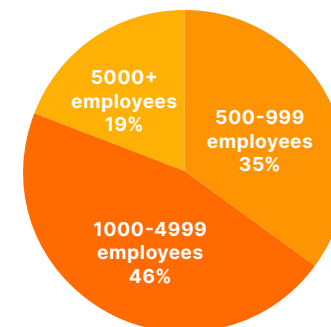
Moving forward with strategy, partnerships and skills development

- The pandemic has impacted technology strategy and spending – IT leaders are building agility into strategy and plans (90%), moving to a multi-cloud strategy (82%), moving to more flexible consumption models (81%) and increasing investment in modernising their data infrastructure (79%). Other shifts are more frequent reviews of tech priorities and spending, partnering with fewer trusted vendors, increased scenario planning, increased automation and focus on mitigating uncertainty and lowering risk.
- To build on the momentum of last year, IT leaders are looking to forge stronger partnerships and learn from the COO (46%), CFO (43%), CEO (39%) and Chief Procurement Officer (CPO) (39%) among others. 69% say that cloud optimisation is no longer a CIO responsibility but should involve the wider C-suite.
- The key skills and qualities that IT leaders would like to develop over the next 12 months to drive the business forward include strategic thinking/vision (45%), cyber-resilience (44%) and being outcome-focused in how IT drives and supports the business (43%).
- In the next 12 months IT leaders are focused on other wider business initiatives too – 47% are looking to address employee mental health, 46% are focused on sustainability, 40% on technology for good for external societal issues and 35% on diversity and inclusion.

Sample breakdown by seniority



Sample breakdown by organisation size





Despite an improvement in alignment between IT and the rest of the business over the last two years, IT leader motivations and frustrations suggest alignment is still a considerable issue within organisations today. For example, while there's widespread satisfaction around the progress made during the pandemic, only a third of IT leaders considered their processes and culture to be very agile across the business in supporting their needs.

The research also shows that technology priorities from before the pandemic have been re-evaluated and IT leaders are now focused on embedding and accelerating agility across the organisation – with over three quarters agreeing that this is the case. Most are moving from survival to revival mode and

see rapid agility as essential in achieving this. Could it therefore be that rapid agility can help to re-align IT and business? After all, over half say that a key implication of not having rapid agility is increased tensions between IT and the business.

Whatever the answer, movement towards a modern data infrastructure is key to support this level of agility with organisations particularly attracted to upgrading to the latest innovations easily, encrypting data at rest to mitigate the risk of ransomware attacks and enabling always-on/zero downtime. Building momentum towards these changes takes evolving strategy, stronger partnerships and personal skills development – which is why many IT leaders are already thinking about making improvements in these areas over the coming months.



Acknowledging business and IT alignment as a longstanding issue

It's fair to say that business and IT alignment has been a challenge within organisations for decades.



Progress has certainly been made in this area – most recently improving from an average of 48% perceived alignment two years ago, to 64% alignment now (Figure 3), with the UK having made the biggest inroads here. However, despite most IT leaders (78%) feeling proud of the impact they’ve made in their role during the last 12 months, lack of alignment remains a key issue today.

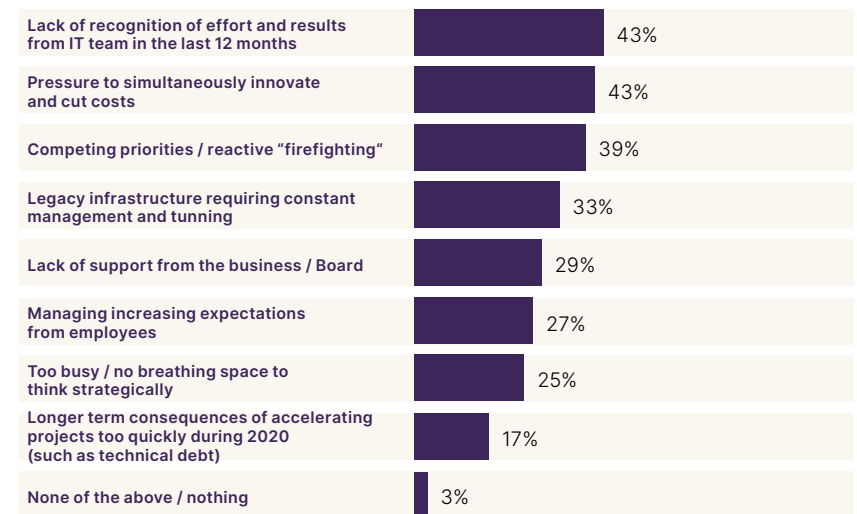
When thinking about how their business was able to respond to the pressures of the pandemic, only 34% considered technology infrastructure to be very robust across the business in supporting their needs, and only 36% considered their processes and culture to be very agile across the business in supporting their needs. Clearly, there is work to be done in terms of building on the progress made over the past two years.

Most interestingly, the things that seem to excite and motivate IT leaders now are directly related to the things that frustrate them. It’s almost like two sides of the same coin. On one hand, Figure 1 shows that knowing IT has proven its value excites half (50%) of IT leaders; but a lack of recognition of effort and results frustrates almost the same number (43%), as can be seen in Figure 2. Just 21% are excited and motivated by the technology itself, dropping with increasing seniority (17% amongst CIOs).

Figure 1: **Things that excite and motivate IT leaders now**



Figure 2: **Things that frustrate IT leaders now**

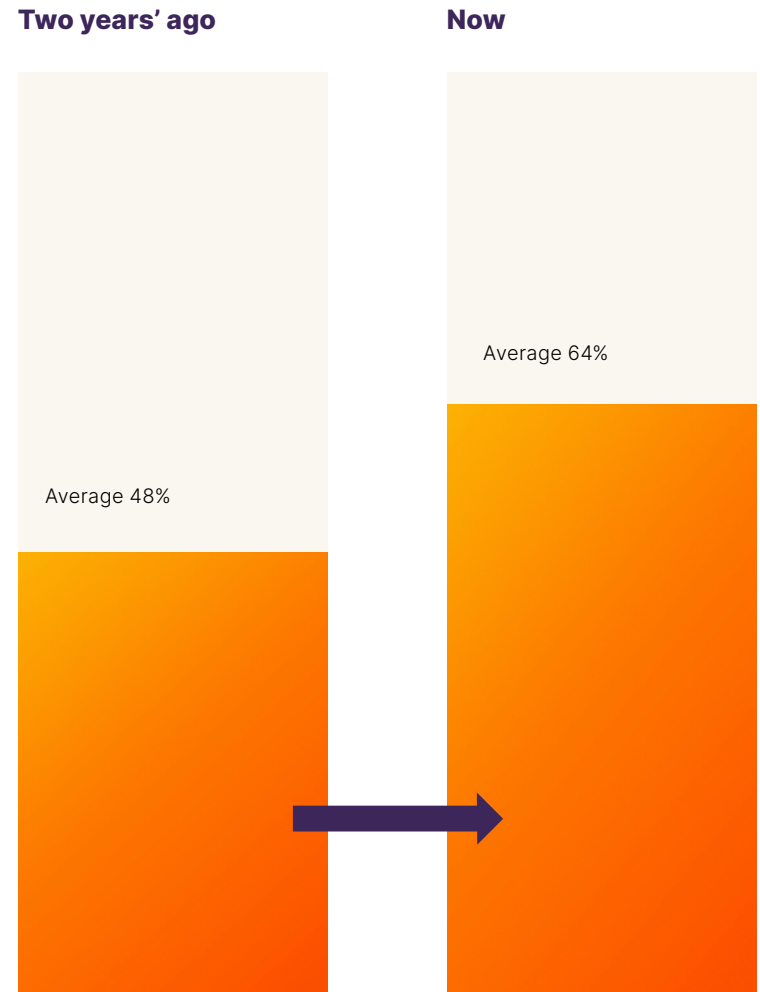


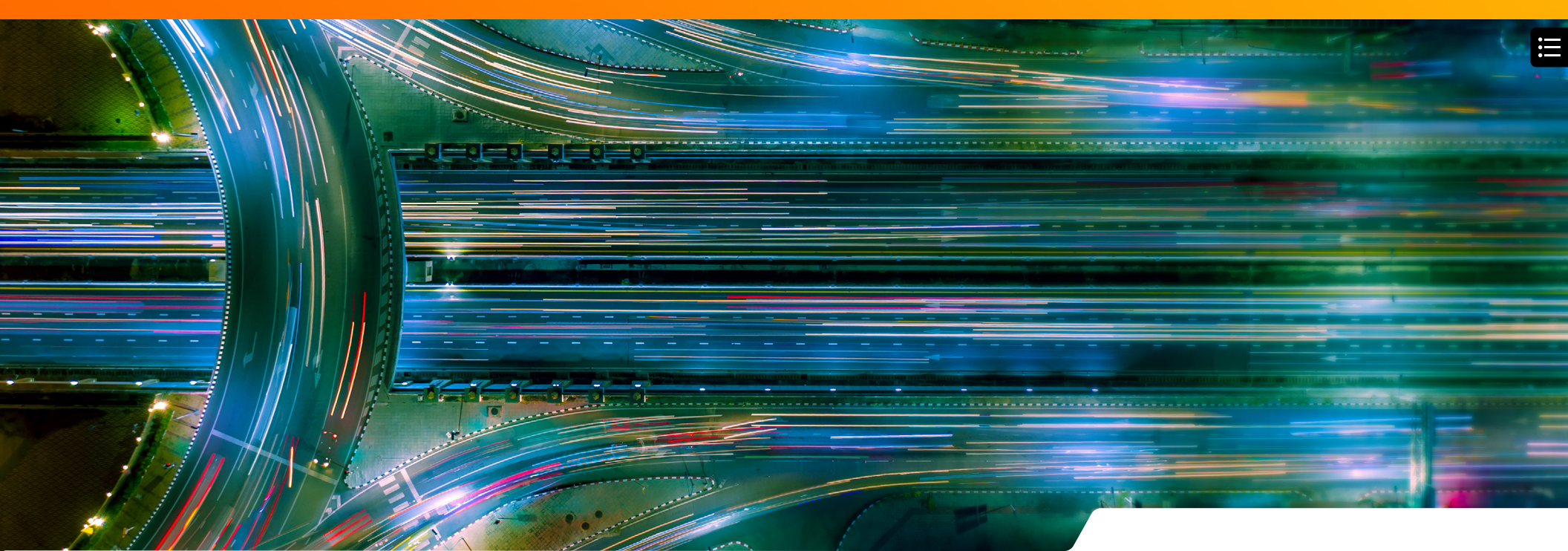
Equally, the idea of having a strategic voice in the organisation motivates half (49%) of IT leaders; but a quarter (25%) don't feel as though they have the breathing space to think strategically. And while roughly a third (30%) want to forge relationships with stakeholders, the same number (29%) are experiencing a lack of support from the Board, this is particularly the case in Financial Services (48%).

Overall, things are slowly heading in the right direction, but there's certainly room for improvement. Yes, the IT department was one of the superheroes of the pandemic, but now's the time for its tools, processes and technology to evolve in order for it to move forward into the next chapter of the journey – and hopefully align more closely with the rest of the business.



Figure 3: **Average % perceived alignment between IT and business leaders two years' ago and currently**





Re-evaluating priorities and accelerating agility

In organisations of different sizes and in different sectors across Europe, technology priorities from before the pandemic have been largely re-evaluated and IT leaders are now focusing on the importance of agility. However, it's clear to see in Figure 4 that different countries are moving at entirely different paces – why is this?



The Netherlands, for example, is behind the rest with only half (56%) of IT leaders thinking that their priorities have been largely re-evaluated. Does this mean that they had their priorities right in the first place? And what does that then say about Switzerland where most of their IT leaders (90%) have had to re-think things – were they focusing on the ‘wrong’ priorities before the pandemic?

As more and more businesses (82%) continue to shift from survival to revival mode, most IT leaders (82%) agree that the role of agility is essential for the achievement of innovation and growth. As Figure 5 shows, agility is the top priority for most (86%), but it’s not simply about enabling it – it’s about embedding it into the fabric of an organisation’s operations and accelerating it across each part of the business.

Many key priorities also link directly to the things that excite IT leaders (Figure 1) as well as the things that frustrate them (Figure 2). For instance, enhancing the digital experience for a remote or hybrid working future (82%) relates to the frustrations faced around managing increasing expectations from employees. Optimising costs/ right-sizing IT (78%) links to the frustration of having to simultaneously innovate and cut costs. And the continued acceleration of digital transformation (77%) matches with the excitement around leading change efforts. With this in mind, will these priorities therefore carry the greatest impact within the organisation? And will they ultimately help to realign IT with the rest of the business?

Figure 4: % saying technology priorities from before the pandemic have been largely re-evaluated



Figure 5: IT leader priorities for the next 12 months





Healing the business-IT rift with rapid agility?

Broadly speaking, there's a lack of confidence within organisations when it comes to enabling agility – only 1 in 4 IT leaders is very confident they will be able to embed and accelerate agility into 2021 and beyond. Confidence is somewhat higher in CIOs (29%), in the largest businesses (33%) and amongst female IT leaders (28% compared to 22% of male IT leaders).



There are several contributing factors to this general lack of confidence as can be seen in Figure 6, but the biggest barriers are lack of alignment between business and IT strategy (45%), data 'lockdown' or siloes in the organisation (43%) and rigid processes that thwart progress (43%). Additionally, 38% say legacy infrastructure and 37% think outdated business models and ways of working are the stumbling blocks.

It's apparent that harnessing and optimising data could be the key to enabling rapid agility, with 69% of IT leaders saying that organisations are only as agile as their slowest department when it comes to data. But what if data isn't utilised to the full? What are the effects of not having rapid agility?

According to the research, the two key implications of not having rapid agility are increased tensions between IT and the business (52%) and increased complexity (50%) as shown in Figure 7. Other implications include negative effects such as reduced productivity (38%), lack of innovation (35%), lost business opportunities/revenue (31%), customer dissatisfaction/churn (31%), employee dissatisfaction/churn (27%) and reputational damage (25%).

Could it therefore be said that alignment between business and IT is the lever that differentiates the top performing IT departments? It certainly seems to act as an enabler when it's there, yet a barrier when it's not. Could rapid agility be the key to healing a longstanding rift that has been present in organisations for a long time? Only time will tell, but with embedding and accelerating agility being the top priority for IT leaders today (Figure 5), it will definitely be interesting to see if things continue to improve over the coming years.

Figure 6: **Biggest barriers to rapid agility**

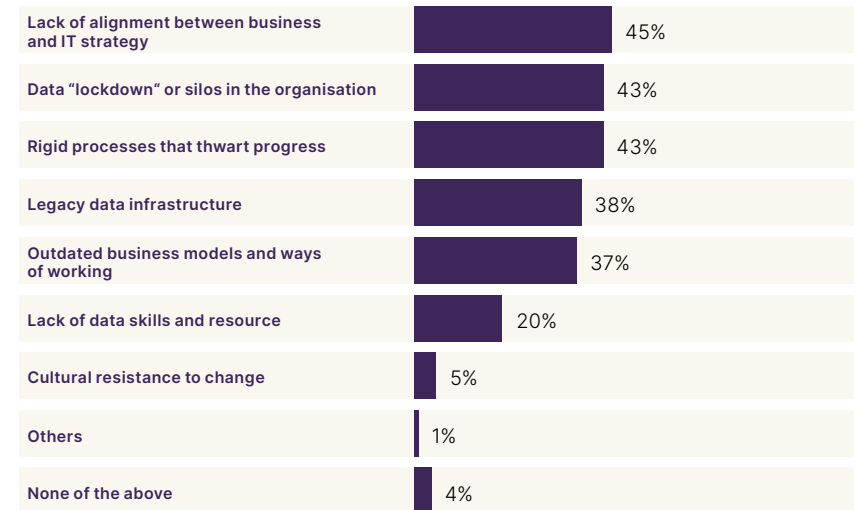
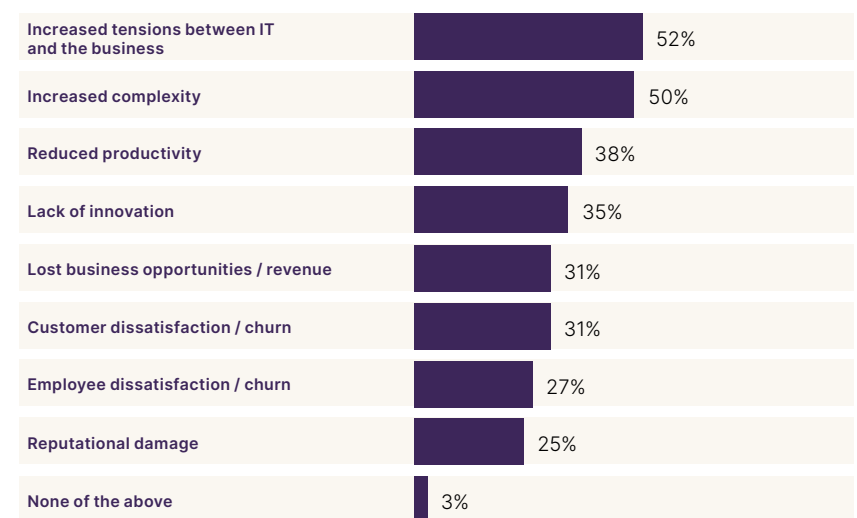


Figure 7: **Implications of NOT having rapid agility**





Supporting rapid agility with a modern data infrastructure

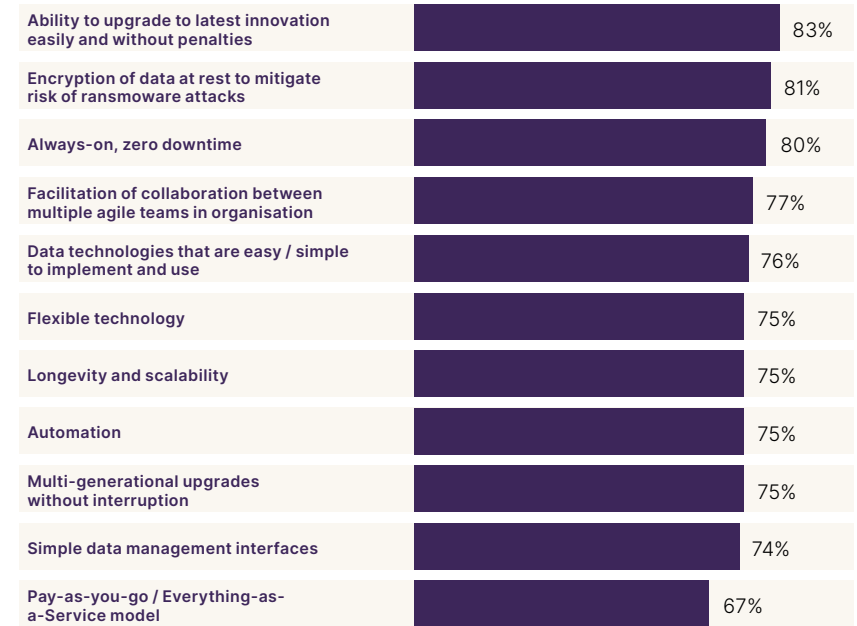
With the barriers to rapid agility identified, and the implications outlined, how then do we overcome the challenges and successfully support rapid agility within the business? With data already recognised as an important factor, it's crucial for organisations to establish a modern data infrastructure.



New priorities mean that some old, legacy systems are not always suitable and indeed 77% say that COVID-19 is accelerating the need for their organisation to completely overhaul its data infrastructure – not just tweak or update.

So what then does a modern data infrastructure look like? As can be seen in Figure 8, IT leaders see the key elements as including the ability to upgrade to the latest innovations easily and without penalties (83%), encryption of data at rest to mitigate the risk of ransomware attacks (81%), always-on/zero downtime (80%), the facilitation of collaboration between multiple agile teams in organisation (77%) and data technologies that are easy to implement and use (76%). By getting these firm foundations in place, it is possible to support rapid agility – and the appetite for achieving this is certainly there: over half of IT leaders (59%) would like to have a modernised data infrastructure within 12 months, increasing to 70% in retail.

Figure 8: **Elements of modern data infrastructure to support rapid agility**

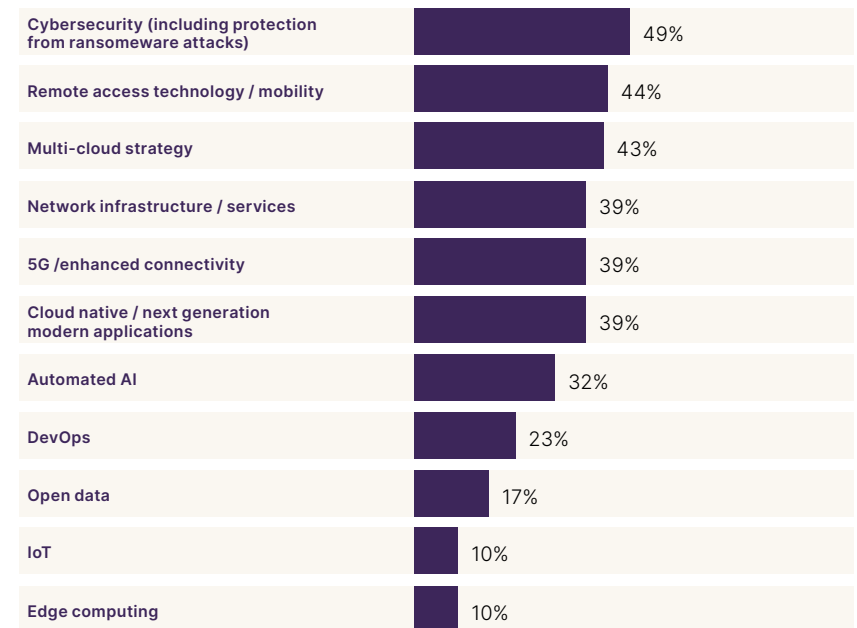




With this motivation in mind, priority areas for technology investment over the next two years have been identified as cybersecurity, including protection from ransomware attacks (49% - increasing to 54% in CIOs), remote access technology/mobility (44%) and a multi-cloud strategy (43%) – as seen in Figure 9. Additionally, over the next two years, about half (48%) see their use of Storage-as-a-Service increasing. And the most compelling benefits of flexible consumption/as-a-service models are seen as boosting agility (54%), increased security (49%), dynamic scalability (41%) and paying only for what you use (40%).

Clearly, flexibility is a key requirement of the modern data infrastructure – both in terms of the financial way organisations consume services and the scalability this enables; as well as the infrastructure itself, with IT leaders recognising the need for a blend of both legacy systems and newer cloud services as part of a multi-cloud approach.

Figure 9: **Priority areas for tech investment over next two years**





Moving forward with strategy, partnership and skills development

The pandemic has impacted technology strategy and spending in a number of ways. First and foremost, IT leaders are building agility into their strategy and plans (90%). They also cite moving to a multi-cloud strategy (82%), moving to more flexible consumption models (81%) and increasing investment in modernising their data infrastructure (79%), as shown in Figure 10. Other shifts include more frequent reviews of technology priorities and spending, partnering with fewer trusted vendors, increased scenario planning, increased automation and focus on mitigating uncertainty and lowering risk.



To build on the momentum of last year and move forward with purpose, IT leaders are looking to forge stronger partnerships and learn from other leaders in the business - the COO (46%), CFO (43%), CEO (39%) and CPO (39%) among others. In addition, 69% say that cloud optimisation is no longer a CIO responsibility but should involve the wider C-suite – increasing to 75% amongst CIOs.

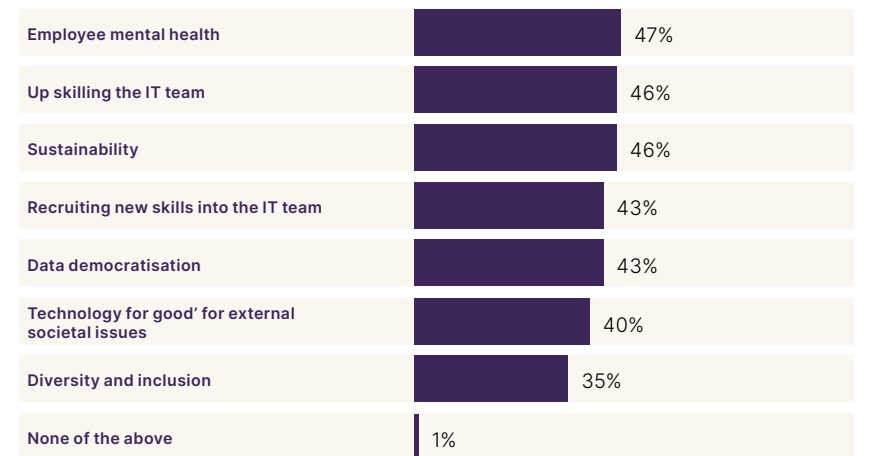
Could this focus on partnership and teamwork be a further key contributor in closing the longstanding business and IT gap? Furthermore, many IT leaders recognise that, on a personal level, they will need to build their own skills and qualities over the next 12 months to drive the business forward. These skills include strategic thinking/vision (45%), cyber-resilience (44%) and being outcome-focused on how IT drives and supports the business (43%). Additionally, female IT leaders are focused on growing their personal influence and credibility as a leader (43% compared to 33% of male IT leaders).

As you can see in Figure 11, upskilling the IT team ranks high on the list of ‘other IT leader focus areas’ over the coming year (46%). But interestingly, alongside this 47% are thinking even wider than that by turning their attentions to employee mental health. This is especially a focus for male IT leaders (49% versus 35% for women), which is perhaps unsurprising in a male-dominated field. However, beyond mental health, it’s also worth noting a focus on sustainability (46%), technology for good for external societal issues (40%) and diversity and inclusion (35%), which all rightfully continue to gain prominence within organisations today.

Figure 10: **Impact of COVID-19 on technology strategy and spending**



Figure 11: **Other IT leader focus areas over next 12 months**



Conclusion

Amidst unprecedented disruption and change, IT leaders have worked hard to keep business moving and they're understandably excited and motivated by knowing that IT has proven its value. But now, as organisations continue to move from survival to revival mode, it's time to elevate the thinking around technology and prepare the business for any eventuality in the future.

The concept of rapid agility is therefore key. Agility has taken on a whole new meaning following the COVID-19 shockwave, organisations have had to act far more swiftly than normal, and the key factor that determines an organisation's ability to thrive in the future is data. Consequently, there is a clear need for an overhaul of data infrastructures, and alongside this, closer alignment between IT and the business. There's no doubt that much work needs to be done to achieve this, but the reward of doing so could well be a differentiating factor for top performing IT departments.

While there has been recent improvement in alignment between IT and the rest of the business, IT leader motivations and frustrations suggest there is still a considerable gap to bridge. However, the good news is that most IT leaders have re-evaluated their priorities and are now focused on embedding and accelerating agility across the organisation – which could well be the best way to heal the longstanding rift. They're moving forward by devising new strategies, forging new partnerships and developing new skills. They're focused on wider issues like employee mental health, diversity and inclusion and technology for good as well. Many are looking to invest in solid foundations and modernise their data infrastructures, enabling them to build on the momentum of last year, to elevate their thinking and be ready for anything. Are you?

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APPENDIX

Regional Summaries





UK: Summary

IT leaders in the UK are particularly proud of the progress they made during the past year, keeping businesses moving throughout a highly challenging time. But while over half are motivated by knowing that IT has proven its value, only a quarter say that the technology itself is what drives them.

With most IT leaders feeling as though their organisation is now moving from survival to revival mode, the top priorities have become embedding and accelerating agility across the business, enhancing digital customer experience, and enhancing the digital experience for employees too.

There's a focus on aligning IT with the wider business too –the UK has had the biggest improvement in alignment over the past two years of all the countries surveyed.

With rapid agility high on the agenda, there's little wonder then that three quarters of IT leaders are feeling the need to overhaul their data infrastructure – and well over half would like to have a modernised data infrastructure within the next year. Most IT leaders are building agility into their strategies and plans, many are looking to forge stronger partnerships and learn from the rest of the business, and around half would like to work on their own skills in order to drive change.



Pride, excitement and frustration amongst IT leaders

- 87% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months, only Switzerland is higher. IT leaders are most excited and motivated by knowing that IT has proven its value (57%), by IT having a strategic voice in the organisation (56%) and linking technology to business outcomes (52%). Only 1 in 4 (26%) say the technology itself is what excites and motivates them.
- IT leaders are most frustrated by a lack of recognition of effort and results from the IT team in the last 12 months (51%), competing priorities/reactive 'firefighting' (45%) and pressure to simultaneously innovate and cut costs (44%).
- The alignment between IT leaders and the business is improving - from an average 46% alignment two years' ago, to a 66% alignment now – the biggest improvement of all countries.
- When thinking about how the business was able to respond to the pressures of the pandemic – 41% considered technology infrastructure to be very robust across the business in supporting their needs and 42% considered their processes and culture to be very agile across the business in supporting their needs

Re-evaluating priorities and accelerating agility

- 75% say that tech priorities from before the pandemic have been largely re-evaluated.
- 89% say they are moving from survival into revival mode as an organisation and 83% say rapid agility is essential for them to achieve innovation and growth.

- The top five priorities for the next 12 months are embedding and accelerating agility across the business (82%), enhancing digital customer experience/optimising customer journeys (80%), enhancing digital experience for a remote or hybrid working future (77%), driving innovation and rethinking business models (76%) and optimising costs/right-sizing IT (72%).

Healing the business-IT rift with rapid agility?

- 34% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (average of all countries - 23%).
- The biggest barriers to rapid agility are data 'lockdown' or siloes in the organisation (48%), lack of alignment between business and IT strategy (45%), rigid processes that thwart progress (41%) and outdated business models and ways of working (41%).
- The key implications of NOT having rapid agility are increased complexity (56%), increased tensions between IT and the business (53%) and reduced productivity (43%).

Supporting rapid agility with a modern data infrastructure

- 75% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure.
- Elements of a modern data infrastructure seen as important include the ability to upgrade to the latest innovations easily and without penalties (80%), encryption of data at rest to mitigate the risk of ransomware attacks (80%) and always-on/zero downtime (78%).
- 19% say they already have a modernised data infrastructure. 57% would like to have a modernised data infrastructure within 12 months.

- Over the next two years, 72% see use of Storage-as-a-Service increasing – higher than other markets. Priority areas for tech investment over the next two years are cybersecurity (59% – highest), network infrastructure/services (46%), remote access technology (39%) and cloud native applications (39%).

Moving forward with strategy, partnerships and skills

- IT leaders are building agility into strategy and plans (86%), increasing investment in modernising data infrastructure (79%), moving to a multi-cloud strategy (78%) and more flexible consumption models (76%).
- IT leaders are looking to forge stronger partnerships with the COO (54%), CPO (45%) and CFO (44%) among others.
- The key skills IT leaders would like to develop over the next 12 months include strategic thinking/vision (52% – highest), cyber-resilience (45%) and being outcome-focused (41%).
- In the next 12 months, 56% are looking to address employee mental health, 51% are focused on data democratisation and 49% on sustainability.





France: Summary

While three quarters of French IT leaders feel satisfied with the impact they made during the past year, well over a third are frustrated by a lack of recognition for their efforts. And only a quarter consider their processes and culture to be very agile across the business in supporting their needs – the lowest of all countries surveyed.

Consequently, a large majority have identified embedding and accelerating agility across the business as their number one priority, and an equally high percentage think rapid agility is essential for them to achieve innovation and growth.

Surprisingly, however, a lack of alignment between business and IT is less of an issue in France than other countries – and further down the ranking when compared to other barriers to rapid agility, such as rigid processes that thwart progress, data siloes and legacy data infrastructure. While the number of IT leaders who think that COVID-19 is accelerating the need for a data infrastructure overhaul is also below average, there is certainly an appetite for change. 9 out of 10 view the ability to upgrade to the latest innovations as being crucial to success and over 8 out of 10 are looking to eliminate downtime – benefits directly enabled by a modern data infrastructure.



Pride, excitement and frustration among IT leaders

- 74% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months. IT leaders are most excited and motivated by driving digital transformation and leading change efforts for the organisation (66%), helping/supporting others in their IT careers (49%) and by IT having a strategic voice in the organisation (47%). Only 1 in 5 (21%) say the technology itself is what excites and motivates them.
- IT leaders are most frustrated by competing priorities/ reactive 'firefighting' (38%), a lack of recognition of effort and results from the IT team in the last 12 months (37%) and pressure to simultaneously innovate and cut costs (37%). The alignment between IT leaders and the business is improving - from an average 47% alignment two years' ago, to a 61% alignment now.
- When thinking about how the business was able to respond to the pressures of the pandemic - 32% considered technology infrastructure to be very robust across the business in supporting their needs and 26% considered their processes and culture to be very agile across the business in supporting their needs (lowest of all countries).

Re-evaluating priorities and accelerating agility

- 73% say that tech priorities from before the pandemic have been largely re-evaluated. 79% say they are moving from survival into revival mode as an organisation and 85% say rapid agility is essential for them to achieve innovation and growth.

- The top priorities for the next 12 months are embedding and accelerating agility across the business (87%), optimising costs/right-sizing IT (82%), enhancing digital customer experience/optimising customer journeys (81%) and enhancing digital employee experience (for a remote/hybrid working future) (77%).

Healing the business-IT rift with rapid agility?

- Only 19% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond.
- The biggest barriers to rapid agility are rigid processes that thwart progress (47%), data 'lockdown' or siloes in the organisation (41%) and legacy data infrastructure (37%). Lack of alignment between business and IT strategy less of an issue in France (32%).
- The key implications of NOT having rapid agility are increased tensions between IT and the business (48%), increased complexity (47%) and lack of innovation (42%).

Supporting rapid agility with a modern data infrastructure

- 68% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure (lower than 77% average).
- Elements of a modern data infrastructure seen as important include the ability to upgrade to the latest innovations easily and without penalties (90%), multi-generational upgrades without interruption (85%) and always-on/zero downtime (85%).
- 8% say they already have a modernised data infrastructure (lowest of all countries). 64% would like to have a modernised data infrastructure within 12 months.

- Over the next two years, 66% see use of Storage-as-a-Service increasing. Priority areas for tech investment over the next two years are multi-cloud strategy (53%), cybersecurity (45%), cloud native applications (36%) and 5G/enhanced connectivity (36%).

Moving forward with strategy, partnership and skills

- IT leaders are building agility into strategy and plans (90%), moving to a multi-cloud strategy (87%), moving to more flexible consumption models (78%) and tech priorities and spending are reviewed more frequently (76%).
- IT leaders are looking to forge stronger partnerships with the CFO (51%), COO (38%) and CPO (35%) among others.
- The key skills IT leaders would like to develop over the next 12 months include cyber-resilience (51% - highest), strategic thinking/vision (47%) and experimental/agile methodologies (42% - highest).
- In the next 12 months 43% are looking to address employee mental health, 42% are focused on sustainability and 38% on diversity and inclusion.





Germany: Summary

Despite recognising rapid agility as being essential in achieving growth and prioritising the need to embed and accelerate agility across the business, very few German IT leaders are confident in being able to achieve it this year and beyond – the lowest of all countries.

This is fascinating given that almost all IT leaders are currently building agility into their strategy and plans, so perhaps it has something to do with the perceived barriers to rapid agility – which are seen to be rigid processes, a lack of alignment between business and IT strategy, and data siloes.

Their top priority is to enhance the digital experience for a remote or hybrid working future followed by embedding and accelerating agility across the business.

Of all countries, German IT leaders are most excited and motivated by knowing that IT has proven its value. A high percentage are moving forward by increasing investment in modernising their data infrastructure. And almost half are actively upskilling their IT team as they look to move from survival to revival mode – so they're certainly interested in continuing their digital transformation journeys.



Pride, excitement and frustration among IT leaders

- 74% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months.
- IT leaders are most excited and motivated by knowing that IT has proven its value (59% – highest), by IT having a strategic voice in the organisation (41%) and by always learning and developing (40%). Only 1 in 5 (22%) say the technology itself is what excites and motivates them.
- IT leaders are most frustrated by pressure to simultaneously innovate and cut costs (41%), competing priorities/ reactive ‘firefighting’ (36%) and legacy infrastructure requiring constant management and tuning (32%).
- The alignment between IT leaders and the business is improving - from an average 50% alignment two years’ ago, to a 65% alignment now.
- When thinking about how the business was able to respond to the pressures of the pandemic – 27% considered technology infrastructure to be very robust across the business in supporting their needs and 31% considered their processes and culture to be very agile across the business in supporting their needs.

Re-evaluating priorities and accelerating agility

- 73% say that tech priorities from before the pandemic have been largely re-evaluated.
- 88% say they are moving from survival into revival mode as an organisation and 81% say rapid agility is essential for them to achieve innovation and growth.

- The top five priorities for the next 12 months are enhancing digital experience for a remote or hybrid working future (92%), embedding and accelerating agility across the business (89%), enhancing digital customer experience/optimising customer journeys (85%), optimising costs/right-sizing IT (85%) and continued acceleration of digital transformation (76%).

Healing the business-IT rift with rapid agility?

- Only 11% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (lowest – average 23%).
- The biggest barriers to rapid agility are rigid processes that thwart progress (42%), lack of alignment between business and IT strategy (37%) and data ‘lockdown’ or siloes in the organisation (37%).
- The key implications of NOT having rapid agility are increased tensions between IT and the business (48%), increased complexity (41%) and reduced productivity (41%).

Supporting rapid agility with a modern data infrastructure

- 81% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure.
- Elements of a modern data infrastructure seen as important include the ability to upgrade to the latest innovations easily and without penalties (88%), facilitation of collaboration between multiple agile teams (87%) and encryption of data at rest to mitigate the risk of ransomware attacks (86%).
- 15% say they already have a modernised data infrastructure. 63% would like to have a modernised data infrastructure within 12 months.

- Over the next two years, 48% see use of Storage-as-a-Service increasing. Priority areas for tech investment over the next two years are multi-cloud strategy (49%), cloud native applications (46%), cybersecurity (44%) and remote access technology (44%).

Moving forward with strategy, partnership and skills

- IT leaders are building agility into strategy and plans (94%), moving to a multi-cloud strategy (85%), increasing investment in modernising data infrastructure (80%) and moving to more flexible consumption models (78%).
- IT leaders are looking to forge stronger partnerships with the CEO (46% – highest), CFO (39%) and COO (35%).
- The key skills IT leaders would like to develop over the next 12 months include cyber-resilience (41%), being outcome-focused in how IT drives and supports the business (40%) and ability to empower and motivate a dispersed IT team (40%).
- In the next 12 months 46% are looking to upskill the IT team, 46% are focused on technology for good, 44% on sustainability and 43% on employee mental health.





Spain: Summary

In Spain, things are looking decidedly optimistic for IT leaders. Over three quarters are proud of the progress made in the last 12 months; IT leaders are the most excited of all countries at the prospect of driving digital transformation; they're the most motivated of all countries at the idea of always learning and developing; and well over a third are confident about embedding and accelerating agility in 2021 and beyond – again, the highest of anywhere surveyed. More than 8 in 10 say rapid agility is essential for them to achieve innovation and growth and the highest proportion say COVID-19 has accelerated the need to overhaul their data infrastructure.

Is this positivity down to the fact that alignment between IT leaders and the business is the highest of all the regions? Almost three quarters feel in alignment with the wider business and over half consider their processes and culture to be very agile across the business in supporting their needs. On top of this, well over half of IT leaders are looking to forge stronger partnerships with key C-level figures – with the highest percentage of any country wanting to work closely with COO, CPO and Chief Strategy Officer positions. This focus on people also reflects in the number of Spanish IT leaders looking to address employee mental health, which is more than anywhere else. As things stand, Spain really is a progressive, forward-facing place for IT leaders to be.



Pride, excitement and frustration among IT leaders

- 76% of IT leaders say they are satisfied and proud of the progress and impact they made in the last 12 months. IT leaders are most excited by driving digital transformation and leading change efforts for the organisation (73% – highest), by IT having a strategic voice in the organisation (59%) and by always learning and developing (57% – highest). 35% say the technology itself is what excites and motivates them (highest).
- IT leaders are most frustrated by a lack of recognition of effort and results from the IT team in the last 12 months (51%), pressure to simultaneously innovate and cut costs (39%), competing priorities/reactive ‘firefighting’ (33%) and being too busy (33%). The alignment between IT leaders and the business is improving – from an average 58% alignment two years’ ago, to a 73% alignment now (both higher than in other countries).
- When thinking about how the business was able to respond to the pressures of the pandemic – 35% considered technology infrastructure to be very robust across the business in supporting their needs. 53% considered their processes/culture to be very agile across the business in supporting their needs (highest).

Re-evaluating priorities and accelerating agility

- 88% say that tech priorities from before the pandemic have been largely re-evaluated. 67% say they are moving from survival into revival mode as an organisation (lowest) and 86% say rapid agility is essential for them to achieve innovation and growth (highest).

- The top priorities for the next 12 months are embedding and accelerating agility across the business (82%), continued acceleration of digital transformation (78%), enhancing digital customer experience/optimising customer journeys (75%) and risk management (73% – highest).

Healing the business-IT rift with rapid agility?

- 39% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (highest – average 23%).
- The biggest barriers to rapid agility are outdated business models and ways of working (59%), lack of alignment between business and IT strategy (53%) and rigid processes that thwart progress (45%).
- The key implications of NOT having rapid agility are increased complexity (61%), increased tensions between IT and the business (51%) and lack of innovation (41%).

Supporting rapid agility with a modern data infrastructure

- 88% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure (highest along with Switzerland).
- Elements of a modern data infrastructure seen as important include facilitation of collaboration between multiple agile teams (94%), encryption of data at rest to mitigate the risk of ransomware attacks (90%) and the ability to upgrade to the latest innovations easily and without penalties (86%) and always-on/zero downtime (84%).
- 20% they already have a modernised data infrastructure. 63% would like to have a modernised data infrastructure within 12 months.

- Over the next two years, 53% see use of Storage-as-a-Service increasing. Priority areas for tech investment over the next two years are remote access technology (53%), 5G/enhanced connectivity (53%), cybersecurity (49%), and multi-cloud strategy (47%).

Moving forward with strategy, partnership and skills

- IT leaders are building agility into strategy and plans (94%), increasing investment in modernising data infrastructure (88%), moving to more flexible consumption (88%) and moving to a multi-cloud strategy (84%).
- IT leaders are looking to forge stronger partnerships with the COO (61% – highest), CPO (59% – highest) and Chief Strategy Officer (57% – highest).
- The key skills IT leaders would like to develop over the next 12 months include being outcome-focused in how IT drives and supports the business (47%), strategic thinking/vision (45%), cyber-resilience (43%) and data-driven decision making and insight (43% – highest).
- In the next 12 months 59% are looking to address employee mental health (highest), 59% are focused on upskilling the team and 57% on technology for good for external societal issues.





Italy: Summary

Italy was hit particularly hard by COVID-19 in the early stages of the pandemic. Perhaps this is why the key area of focus for Italian IT leaders is now sustainability – the highest of any country surveyed. Equally, Italian IT leaders are the most motivated of any region when it comes to the personal fulfilment of knowing they have made a tangible difference to the business.

And many are excited at the prospect of linking technology to business outcomes. However, despite the good intentions, there's an underlying lack of confidence

in accelerating agility in 2021 and beyond. The biggest barriers being a lack of alignment between business and IT, data siloes and rigid processes.

Perhaps this lack of confidence is why Italian IT leaders are doing more scenario planning around technology than any other country? They're working hard to build agility into strategy and plans, striving to move to a multi-cloud strategy, and investing mostly in things like 5G and enhanced connectivity, network infrastructure, cybersecurity and remote access technology. With over half wanting a modernised data infrastructure within 12 months, it's certainly fair to say that the intention to build a better future is there – but will they deliver?



Pride, excitement and frustration among IT leaders

- 79% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months. IT leaders are most excited and motivated by personal fulfilment in knowing they have made a tangible difference to the business (58% – highest), linking technology to business outcomes (56%) and by driving digital transformation and leading change efforts for the organisation (56%). 23% say the technology itself is what excites and motivates them.
- IT leaders are most frustrated by a lack of recognition of effort and results from the IT team in the last 12 months (50%), competing priorities/reactive ‘firefighting’ (48%) and pressure to simultaneously innovate and cut costs (35%).
- The alignment between IT leaders and the business is improving – from an average 46% alignment two years’ ago, to a 63% alignment now.
- 44% (highest) considered technology infrastructure to be very robust across the business in supporting their needs and 38% considered their processes and culture to be very agile in supporting their needs.

Re-evaluating priorities and accelerating agility

- 79% say that tech priorities from before the pandemic have been largely re-evaluated.
- 75% say they are moving from survival into revival mode as an organisation and 79% say rapid agility is essential for them to achieve innovation and growth.

- The top priorities for the next 12 months are continued acceleration of digital transformation (83%), enhancing digital experience for a remote or hybrid working future (79%), enhancing digital customer experience/optimising customer journeys (79%) and embedding and accelerating agility across the business (77%).

Healing the business-IT rift with rapid agility?

- Only 19% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (average: 23%).
- The biggest barriers to rapid agility are lack of alignment between business and IT strategy (50%), data ‘lockdown’ or siloes in the organisation (48%) and rigid processes that thwart progress (35%).
- The key implications of NOT having rapid agility are increased complexity (69% – highest), increased tensions between IT and the business (56%) and reduced productivity (42%).

Supporting rapid agility with a modern data infrastructure

- 81% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure.
- Elements of a modern data infrastructure seen as important include the ability to upgrade to the latest innovations easily and without penalties (90%), encryption of data at rest to mitigate the risk of ransomware attacks (85%) and facilitation of collaboration between multiple agile teams (85%).
- 21% say they already have a modernised data infrastructure. 52% would like to have a modernised data infrastructure within 12 months.

- Over the next two years, 61% see use of Storage-as-a-Service increasing. Priority areas for tech investment over the next two years are 5G/enhanced connectivity (56%), multi-cloud strategy (52%), network infrastructure and services (44%), cybersecurity (42%) and remote access technology (42%).

Moving forward with strategy, partnership and skills

- IT leaders are doing more scenario planning around technology (85% – highest), building agility into strategy and plans (83%), moving to a multi-cloud strategy (81%) and increasing investment in modernising data infrastructure (81%).
- IT leaders are looking to forge stronger partnerships with the CPO (48%), COO (46%) and CEO (40%) among others.
- The key skills IT leaders would like to develop over the next 12 months include being outcome-focused in how IT drives and supports the business (52%), strategic thinking/vision (50%), experimental/agile methodologies (37%) and empowering a dispersed IT team (37%).
- Focus areas in the next 12 months include sustainability (63% – highest), recruiting new skills into team (50%) and upskilling the IT team (44%).





The Netherlands: Summary

In the Netherlands, only two thirds of IT leaders feel satisfied with the progress they made in their role during the last 12 months – which is lower than any of the other countries surveyed. Is this because their standards are so high or because they were perhaps behind the curve when it came to responding to change when the pandemic first impacted their businesses?

Either way, only half feel as though their priorities have been re-evaluated from before the pandemic began and few feel confident that they will be able to accelerate agility in 2021 and beyond.

Despite this lack of confidence, embedding and accelerating agility remains the top priority for Dutch IT leaders, and most are building agility into their strategies and plans. Many want to move to more flexible consumption models, mitigate uncertainty, lower risk and are looking to upskill and bring new skills into their IT teams. Notably, infrastructure pains are prompting a move to modernising data infrastructures. So, things will move forward, but perhaps a little slower than some of the other countries surveyed.



Pride, excitement and frustration among IT leaders

- 66% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months (lower than other countries).
- IT leaders are most excited and motivated by knowing that IT has proven its value (46%), always learning and developing (46%), helping/supporting others in their IT careers (42%) and linking technology to business outcomes (42%). Only 14% say the technology itself is what excites and motivates them.
- IT leaders are most frustrated by pressure to simultaneously innovate and cut costs (42%), competing priorities/reactive 'firefighting' (34%) and a lack of recognition of effort and results from the IT team in the last 12 months (32%).
- The alignment between IT leaders and the business is improving – from an average 53% alignment two years' ago, to a 64% alignment now.
- When thinking about how the business was able to respond to the pressures of the pandemic – 26% considered technology infrastructure to be very robust across the business in supporting their needs (lowest). 30% considered their processes and culture to be very agile across the business in supporting their needs.

Re-evaluating priorities and accelerating agility

- 56% say that tech priorities from before the pandemic have been largely re-evaluated (76% is the average).
- 70% say they are moving from survival into revival mode as an organisation and 68% say rapid agility is essential for them to achieve innovation and growth, lower than in other countries.

- The top priorities for the next 12 months are embedding and accelerating agility across the business (88%), enhancing digital employee experience for a remote or hybrid working future (82%), optimising costs/right-sizing IT (82%) and continued acceleration of digital transformation (76%).

Healing the business-IT rift with rapid agility?

- Only 12% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (average: 23%).
- The biggest barriers to rapid agility are data 'lockdown' or siloes in the organisation (46%), lack of alignment between business and IT strategy (42%), and legacy infrastructure (42%).
- The two key implications of NOT having rapid agility are increased tensions between IT and the business (52%), increased complexity (40%) and lack of innovation (34%).

Supporting rapid agility with a modern data infrastructure

- 64% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure, lower than other countries.
- Elements of a modern data infrastructure seen as important include longevity/scalability (84%), multi-generational upgrades without interruption (82%), facilitation of collaboration between multiple agile teams (82%), flexible technology (82%) and always-on/zero downtime (82%).
- 14% say they already have a modernised data infrastructure. 66% would like to have a modernised data infrastructure within 12 months (highest).

- Over the next two years, 38% see use of Storage-as-a-Service increasing (lowest). Priority areas for tech investment over the next two years are cybersecurity (54%), 5G/enhanced connectivity (54%), remote access technology (48%) and network infrastructure/services (38%).

Moving forward with strategy, partnership and skills

- IT leaders are building agility into strategy and plans (88%), moving to more flexible consumption models (80%), mitigating uncertainty and lowering risk (76%) and increasing investment in modernising data infrastructure (74%)
- IT leaders are looking to forge stronger partnerships with the CFO (42%), CEO (38%) and COO (30%) among others.
- The key skills IT leaders would like to develop over the next 12 months include cyber-resilience (46%), being outcome-focused in how IT drives and supports the business (38%) and building personal influence and credibility (38%).
- Other focus areas in the next 12 months include upskilling the IT team (50%), recruiting new skills into the IT team (42%), employee mental health (38%), sustainability (34%) and diversity and inclusion (34%).





Switzerland: Summary

Of all the regions surveyed, Swiss IT leaders seem to be the most confident in their response to the impacts of the pandemic. Almost 9 out of 10 are satisfied with the job they did in the past 12 months; 98% say they are moving from survival into revival mode as an organisation; almost a third are very confident they will be able to accelerate agility in the coming months.

There are widespread moves to build agility into their strategy and plans alongside moves to both multi-cloud and flexible consumption models.

In many ways, Swiss IT leaders are ahead of the game. However, they fall down when it comes to the alignment between IT and leaders and the rest of the business, lagging behind all other countries surveyed. This lack of alignment is further emphasised by being identified as their biggest barrier to rapid agility – with almost three quarters agreeing that this is the case. Maybe this is why Swiss IT leaders are more motivated than any other region to ensure that IT have a strategic voice in the organisation? Clearly, the longstanding issue of alignment needs addressing more than most regions, but the question is, can their focus on rapid agility really help to heal the rift?



Acknowledging business and IT alignment as a longstanding issue

- 88% of IT leaders say they are satisfied and proud of the progress and impact they made in their role during the last 12 months (highest of all countries).
- IT leaders are most excited and motivated by IT having a strategic voice in the organisation (75% – highest), by knowing that IT has proven its value (57%) and by helping and supporting others in their IT careers (55%). Just 4% say the technology itself is what excites and motivates them (lowest of all countries).
- IT leaders are most frustrated by a lack of recognition of effort and results from the IT team in the last 12 months (61% – highest), pressure to simultaneously innovate and cut costs (53% – highest) and legacy infrastructure requiring constant management and tuning (51% – highest).
- The alignment between IT leaders and the business is improving - from an average 39% alignment two years' ago, to a 53% alignment now (lowest of all countries).
- When thinking about how the business was able to respond to the pressures of the pandemic – 37% considered technology infrastructure to be very robust across the business in supporting their needs and 39% considered their processes and culture to be very agile across the business in supporting their needs.

Re-evaluating priorities and accelerating agility

- 90% say that tech priorities from before the pandemic have been largely re-evaluated (highest).
- 98% say they are moving from survival into revival mode as an organisation and 84% say rapid agility is essential for them to achieve innovation and growth.

- The top priorities for the next 12 months are enhancing digital employee experience for a remote or hybrid working future (94%), embedding and accelerating agility across the business (92%), continued acceleration of digital transformation (90%) and enhancing digital customer experience/optimising customer journeys (82%).

Healing the business-IT rift with rapid agility?

- 29% of IT leaders are very confident they will be able to embed and accelerate agility into 2021 and beyond (average: 23%).
- The biggest barriers to rapid agility are lack of alignment between business and IT strategy (73% – highest), rigid processes that thwart progress (59%) and legacy data infrastructure (55%).
- The two key implications of NOT having rapid agility are increased tensions between IT and the business (63% – highest), customer dissatisfaction and churn (45%) and increased complexity (43%).

Supporting rapid agility with a modern data infrastructure

- 88% say COVID-19 is accelerating the need for their organisation to overhaul its data infrastructure (highest).
- Elements of a modern data infrastructure seen as important include the ability to upgrade to the latest innovations easily and without penalties (65%), encryption of data at rest to mitigate the risk of ransomware attacks (59%) and multi-generational upgrades without interruption (59%).
- 24% say they already have a modernised data infrastructure. 47% would like to have a modernised data infrastructure within 12 months.

- Over the next two years, 57% see use of Storage-as-a-Service increasing. Priority areas for tech investment over the next two years are remote access technology (57%), cybersecurity (51%) and cloud native applications (51%).

Moving forward with strategy, partnership and skills

- IT leaders are building agility into strategy and plans (100%), moving to more flexible consumption models (96%), moving to a multi-cloud strategy (94%), increasing investment in modernising data infrastructure (86%) and partnering with fewer, trusted tech vendors (86%).
- IT leaders are looking to forge stronger partnerships with the COO (67%), CFO (49%), CPO (47%) and CEO (45%) among others.
- The key skills IT leaders would like to develop over the next 12 months include being outcome-focused in how IT drives and supports the business (57%), strategic thinking/vision (47%) and cyber-resilience (43%).
- Other focus areas in the next 12 months include recruiting new skills into the IT team (57%), data democratisation (57%), employee mental health (51%) and upskilling the IT team (49%).





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