



2022 IT AGENDA

 Focus topic:
IT-SECURITY

**Metrics
20+
Years**

2022 IT Agenda in a nutshell...

2022 will be a good year for IT, at least for security experts on both sides of the firewall. In addition, digitalisation and talent acquisition again will be at the top of the IT agenda. Technical trends and challenges are taking a back seat.



IT security, digitalisation and the search for skilled employees will be at the top of the IT agenda in this year.

In order to cope with the many complex tasks, IT budgets have been increased substantially - at least in most organisations.

Compared to 2021, IT budgets have risen by an average of 8.9 per cent. Only one in ten respondents still reports a decrease in the IT budget.

Nine out of ten respondents state that the value contribution of IT to the company is high or very high.



IT security, the focus topic of this survey, has been high on the IT agenda for years. Security is now a necessity that consumes almost one tenth of all IT expenditure.

- The share of IT security activities in the total IT budget amounts to 9.6 per cent.
- The budget for IT security has increased for the second time in a row by around 20 per cent.
- But: 82 per cent of all respondents do not know the service levels in the security environment or have not agreed on any in the company.

2022 – Strategic priorities in IT

Security, digitalisation, skilled employees - at the top are three complex tasks to keep the IT ecosystem alive and kicking.

One of the most important movers in 2022 is the search for IT professionals. This ability is key to achieve the other goals.

Automation as a newcomer has been able to position itself in the top group. No wonder, because it also promises positive effects for digitalisation, costs, agility and human resources.



- 1. IT Security**
- 2. Digitalisation**
- 3. Attracting IT skills**
- 4. Agility / Flexibility in IT**
- 5. Automation**

IT as a driver for success!

Higher expectations as a result of the Covid-19 pandemic have strengthened the position of corporate IT and put its importance for enterprises in the spotlight. Not surprisingly, this has raised the self-confidence of IT managers to a new high.

92%

of the participants in this survey now rate the contribution of IT to the company's success as high or very high. On the six-point scale for this question, the mean value is 4.68 and the median is 5. This means that half of all managers describe the value contribution of IT as "very high".

In the "2017 IT Agenda", 22 percent of the participants described their own IT as a "cost factor", while 78 percent referred to its value contribution.

The increasing importance of IT for corporate success is certainly also because IT has moved out of the offices and into production and products. Take the automotive industry, for example: sophisticated in-car entertainment, over-the-air updates and autonomous driving would be unthinkable without IT, and such services are now important criteria for marketing and purchasing decisions.

Significant increase in IT budgets

The top-level indicator "IT budget" shows a wide range and industry-specific differences.

At 6.8 per cent of turnover, the average IT budget in 2022 is quite high; in the past two years IT budget was around 4.3 per cent.

The ratio must, however, be evaluated with a sector perspective, because there is a wide gap, for example, between banks and construction companies.

The strong increase leaves room for speculation: Have IT budgets really grown, or have expected revenues shrunk?

Values above ∅

IT / Telecommunications
Public Sector / Government / Defense
Consulting / Services
Banking / Insurance / Financial Services

IT Budget as a
share of revenue

6.8 %

Values below ∅

Energy / Utilities
Biotech / Chemistry / Pharma / Medicine
Mechanical and Plant Engineering
Transport / Traffic
Electrical engineering / Medical Tech
Manufacturing
Automotive / Supplier
Construction
Consumer goods / Food

Absolute growth in IT expenditure

This is where the situation becomes clearer: on average, significantly more money is flowing into IT organisations.

IT budgets have grown continuously over the past four years. However, the current increase of 8.9 per cent on average marks a new peak.

The share of companies with declining budgets has shrunk significantly compared to 2021 (17%). On the other hand, stable budgets have risen from 24 percent to 30 percent.

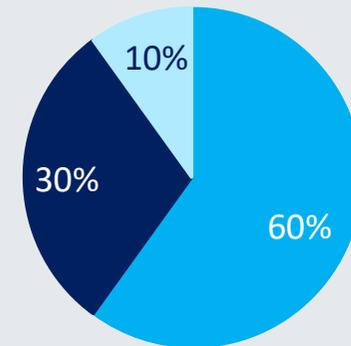
2022 IT Budget

IT budget
compared to 2021



Average

IT budget change
compared to 2021



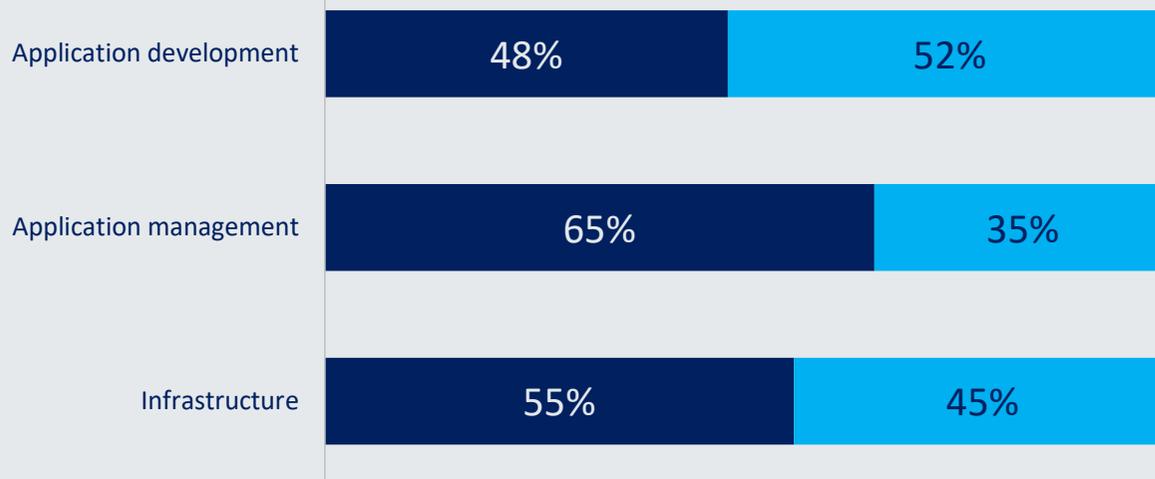
■ Increase ■ Remain constant ■ Decrease

In-house IT production

Application development comes in, infrastructure goes out - this trend has been evident in IT for years.

Many companies consider the development and management of applications as a core competence - in contrast to IT infrastructure, which is slowly but surely being outsourced to service providers or to the cloud.

In-house production share



Most expected change until 2024

Increase	Remain constant	Decrease
↗ 36%	→ 43%	↘ 21%
↗ 34%	→ 56%	↘ 11%
↗ 19%	→ 41%	↘ 41%

Cloud Computing

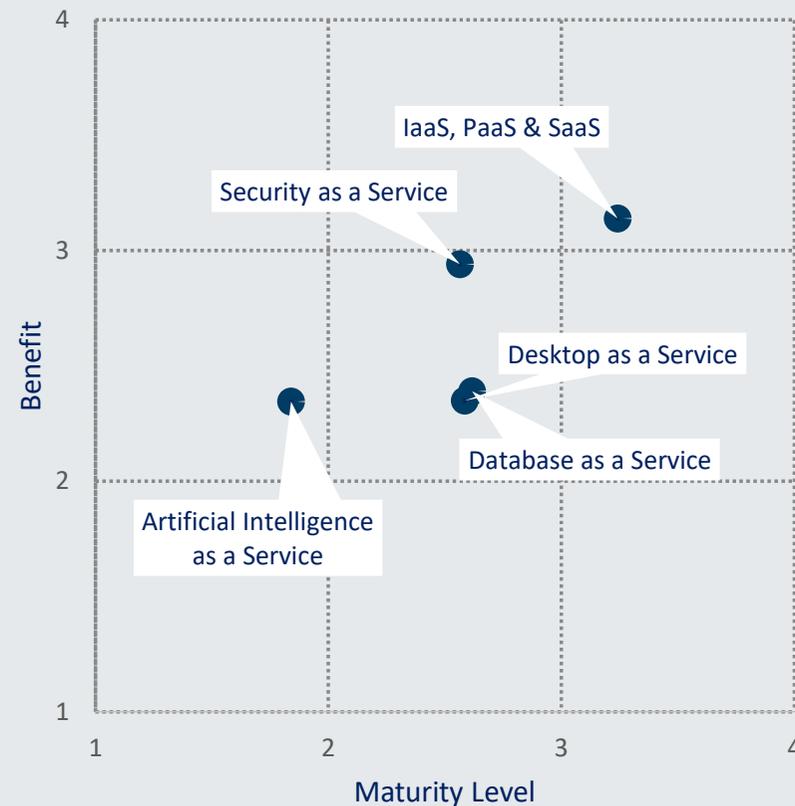
Infrastructure, Platform and Software as a service are again in the highest quadrant in terms of benefits and maturity.

The assessment shows significant similarity with the previous year. There were minimal improvements in the expected benefits for Security as a Service, while AlaaS had to make minor concessions in the same discipline.

Dedicated offerings such as Security, Desktop and Database as a Service again landed in a stable midfield.



Maturity Level & Benefit



1 = very low, 2 = low, 3 = high, 4 = very high

Technology

In the technology section, all topics rank in the middle of the field. RPA and Machine Learning lead the group.

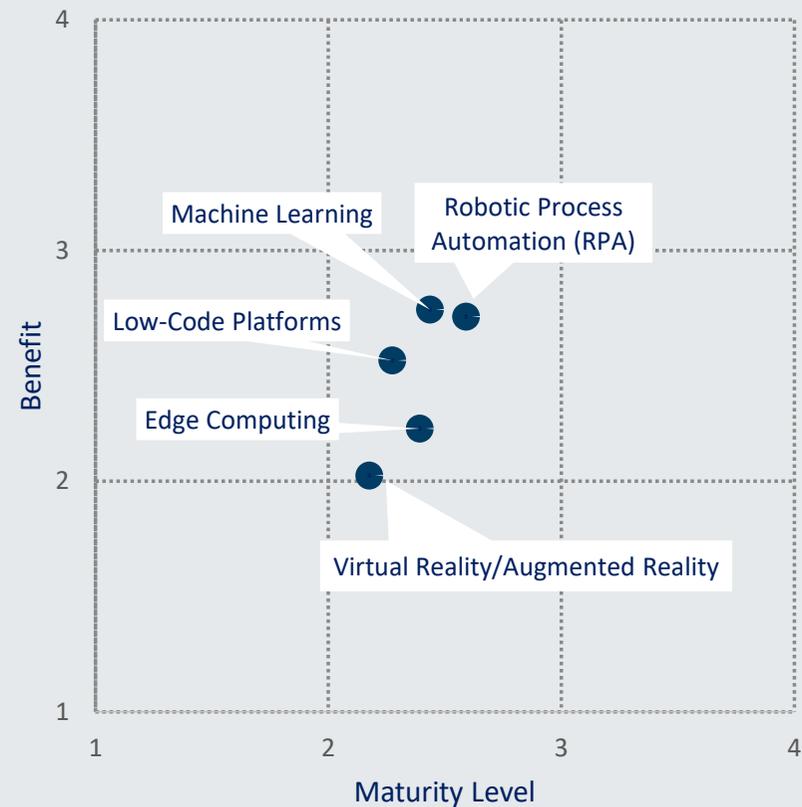
Compared to 2021, the anticipated benefit of Machine Learning and low-code platforms has declined slightly, while the maturity level was unchanged.

Virtual and augmented reality have fallen back slightly in both assessment categories compared to 2021. The hype has died down.

Edge computing has gained ground - not in terms of benefits, but at least in the evaluation of the maturity level.



Maturity Level & Benefit



1 = very low, 2 = low, 3 = high, 4 = very high

Organisation

OKR as a new entrant has left many established management systems behind in terms of maturity and benefits.

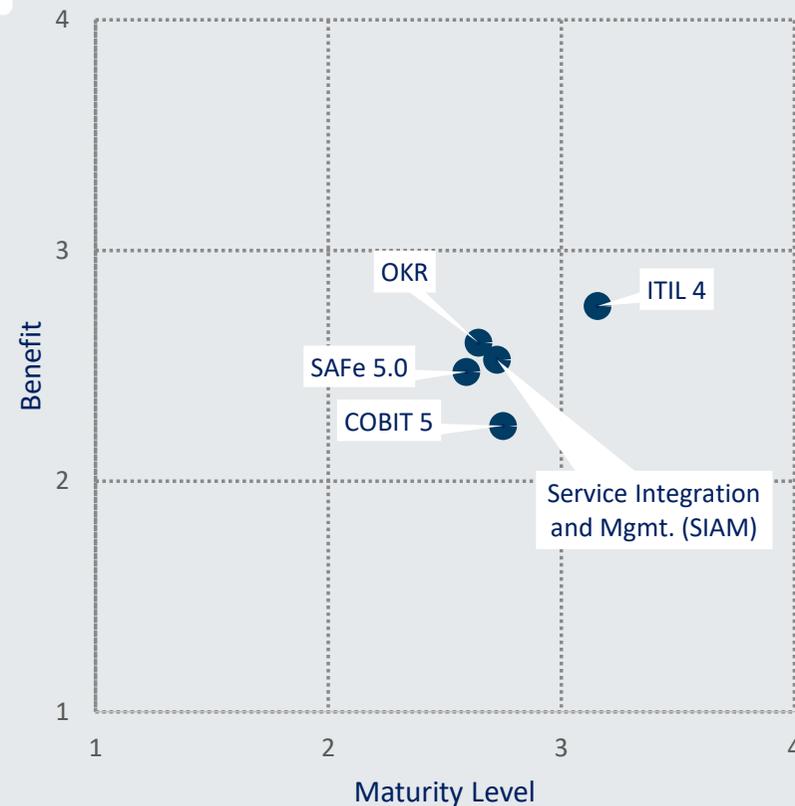
The management method Objectives and Key Results (OKR) has introduced itself very well against established systems.

However, it cannot knock the previous leader ITIL 4 off its throne. The other frameworks were also unable to close the gap to the top.

In terms of usefulness, the well-known governance framework COBIT 5 is clearly at the bottom of the field.



Maturity Level & Benefit



1 = very low, 2 = low, 3 = high, 4 = very high



Focus topic: IT security

82%

of respondents do not know the service levels in the security environment or have not agreed on any in the company.

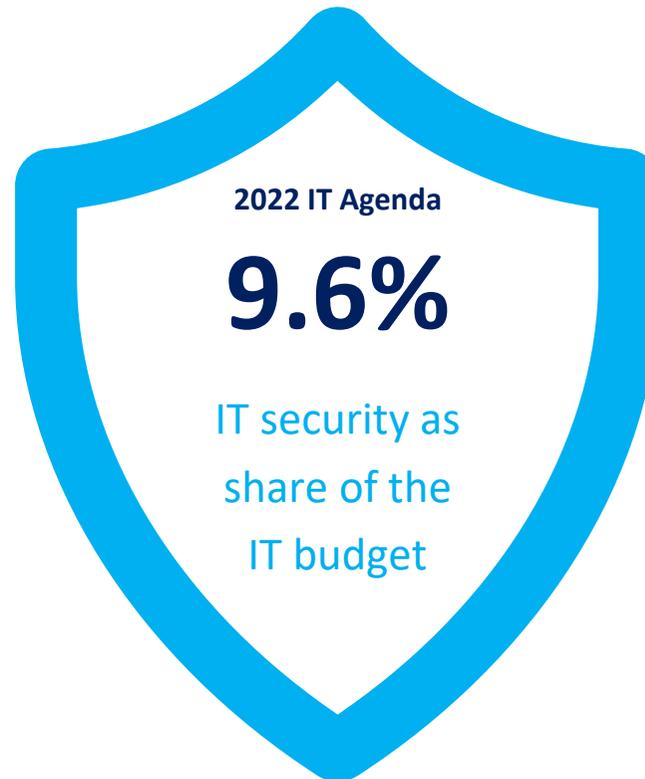




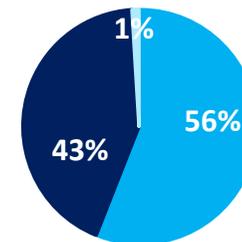
IT security expenditure: Share of IT budget

IT security is a top priority, which is reflected not least in the growth of budgets. Survey participants are quite positive about the trend (or consider the threats to be very dangerous).

Measured as a share of total IT budget, spending on IT security amounts to 9.6% on average.



The value of 9.6% from the survey is intended as a point of reference and does not allow for a qualified comparison. After all, IT organisations differ by industry, size, organisational structure and service level.

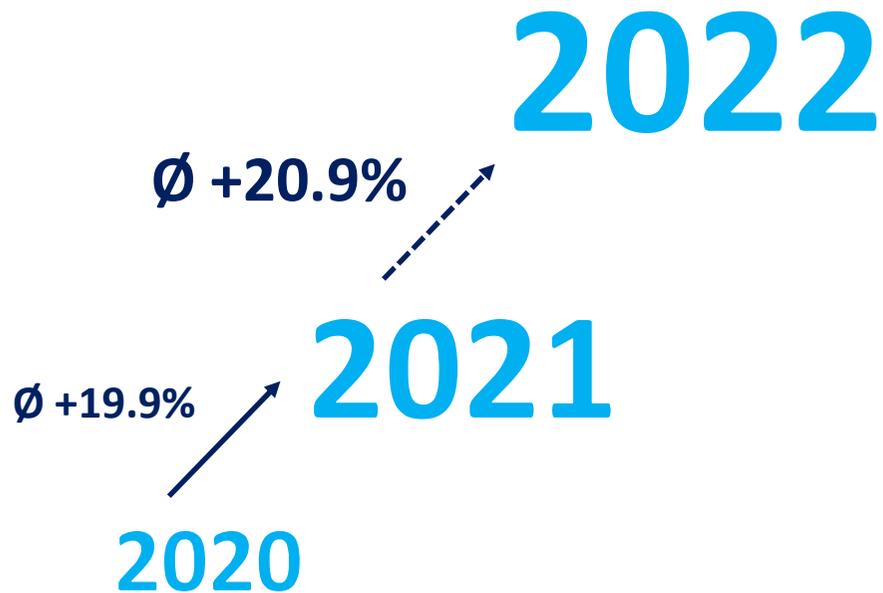


IT security budget 2022

- increased
- remained constant
- decreased



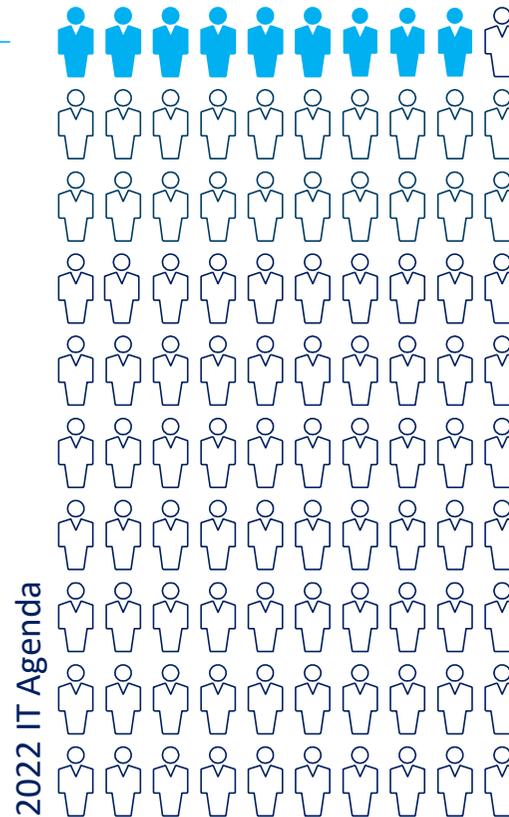
Enormous growth in IT security spending





IT security: Share of employees \approx share of IT budget

9%
IT security employees

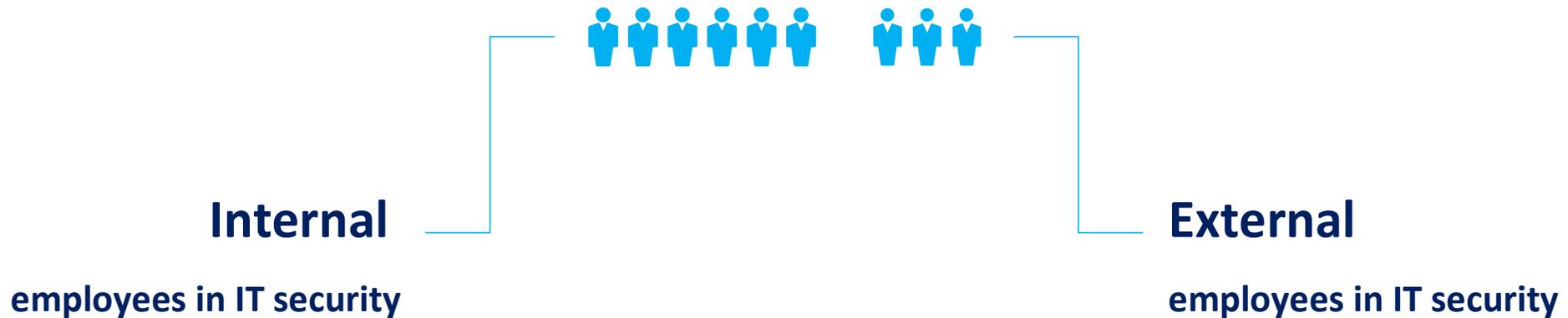


IT employees

2022 IT Agenda



IT security: Share of external employees



Almost 30 per cent of employees in IT security come from outside. They bring skills which are in high demand, carry out penetration tests or support companies with audits and certifications.

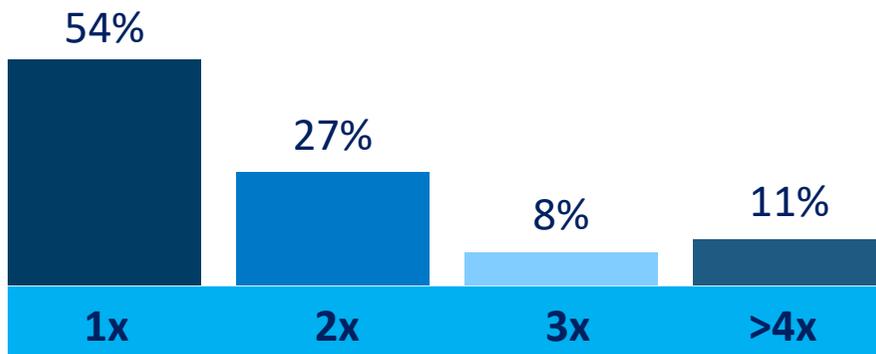


IT security training

85%

of respondents train their employees, including senior managers, on IT security topics.

The majority of these organisations offer one training session per year.



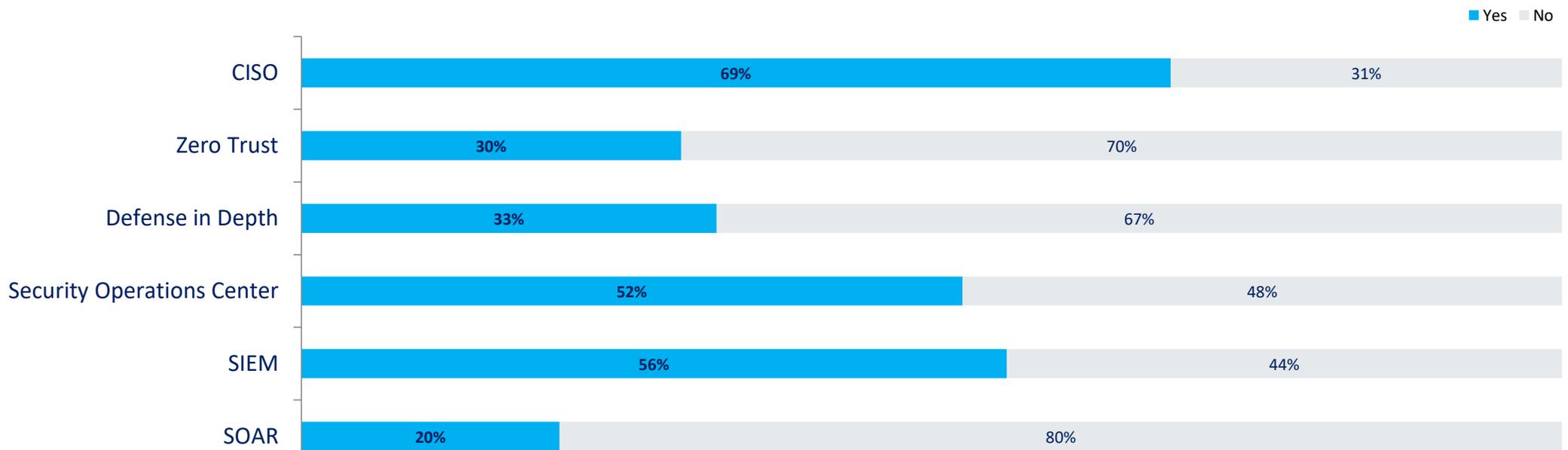
Training sessions per year





Status quo: Today's security practices

More than two-thirds of companies now have a CISO. Compared to the other practices, however, it is also relatively easy to install this role. Therefore, SOC and SIEM are lagging behind somewhat. Other strategies are fighting for trust of the companies.

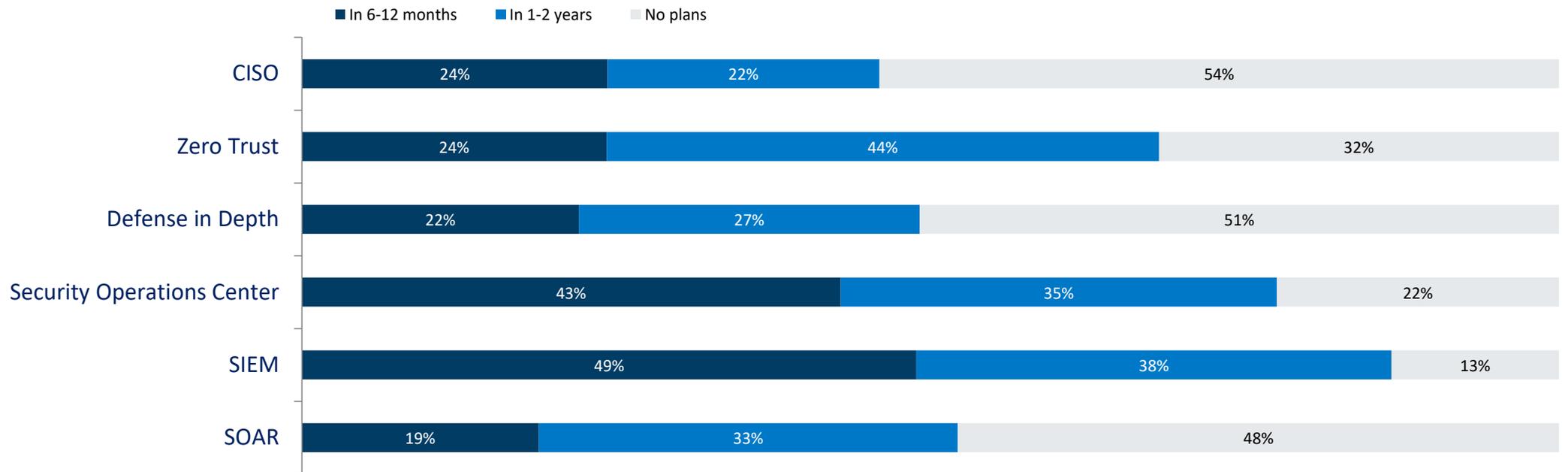


Chief Information Security Officer (CISO) | Security Operations Center (SOC) | Security Information and Event Management (SIEM) | Security Orchestration Automation and Responses (SOAR)



Future: Planned security practices

Reported plans shows the CISO can still continue to grow. In combination with the status quo, only one in seven organisations will relinquish the role. However, SOC and SIEM as well as Zero Trust are catching up. In contrast, Defence in Depth and SOAR are being adopted slowly.



Chief Information Security Officer (CISO) | Security Operations Center (SOC) | Security Information and Event Management (SIEM) | Security Orchestration Automation and Responses (SOAR)



Service levels in the security environment

Mean Time to Acknowledge (MTTA)



- On average, how long does it take for the security team to start working on an issue after receiving an alert?
- Typical response in the 2022 IT Agenda survey: 1 hour

Mean Time to Contain (MTTC)



- On average, how long does it take for the security team to bring identified attack vectors under control?
- Typical response in the 2022 IT Agenda survey: 4 hours

Mean Time to Resolve (MTTR)



- On average, how long does it take for the security team to fix a threat after a vulnerability has been identified?
- Typical response in the 2022 IT Agenda survey: 1 working day

Days to patch



- On average, how long does it take for the security team to apply security patches?
- Typical response in the 2022 IT Agenda survey: 1 working day



Every year, IT seems like the race of the tortoise and the hare. As soon as you have set your agenda for the coming year, a new buzzword appears. IT must avoid running after every trend like a hare. It is more promising to join forces with other tortoises - for example from the business units - in order to weigh up the opportunities and risks of new trends together and proceed steadily.

Karsten Tampier, Head of Data Analytics, Metrics Group



Glossary

CISO - The Chief Information Security Officer (CISO) is usually responsible for the information and data security of an organisation.

COBIT - COBIT is a framework for governance and management of corporate IT. A total of 37 IT processes are assigned control objectives which must be taken into account in order to achieve process goals, IT goals and corporate goals.

Defence in Depth - The multi-level defence (defence in depth) provides for different defence mechanisms to be staggered in order to protect information. The various procedures and redundancies are intended to ensure security of a system as a whole against many different attack vectors.

IaaS, SaaS, PaaS - Infrastructure, Software and Platform as a Service are the three main delivery models in cloud computing.

ITIL - The Information Technology Infrastructure Library (ITIL) is a framework which proposes processes, structures and best practices to improve an organisation's IT Service Management (ITSM).

OKR - Objectives and Key Results (OKR) is a management method for controlling organisations in which goals of the company, teams and employees are linked in a control process.

RPA - Robotic Process Automation (RPA) is a practice in which repetitive, manual, time-consuming or error-prone tasks are learned and automated - imitated - by software bots.

SAFe - The Scaled Agile Framework (SAFe) consists of organisational and workflow patterns for agile practices. It supports coordination, collaboration and execution across multiple teams.

SIEM - Security Information and Event Management (SIEM) is software for central monitoring of the IT infrastructure to detect and report attack patterns and security incidents.

SOAR - Security Orchestration Automation and Responses (SOAR) includes various functions to collect information about security threats and to initiate automatic responses.

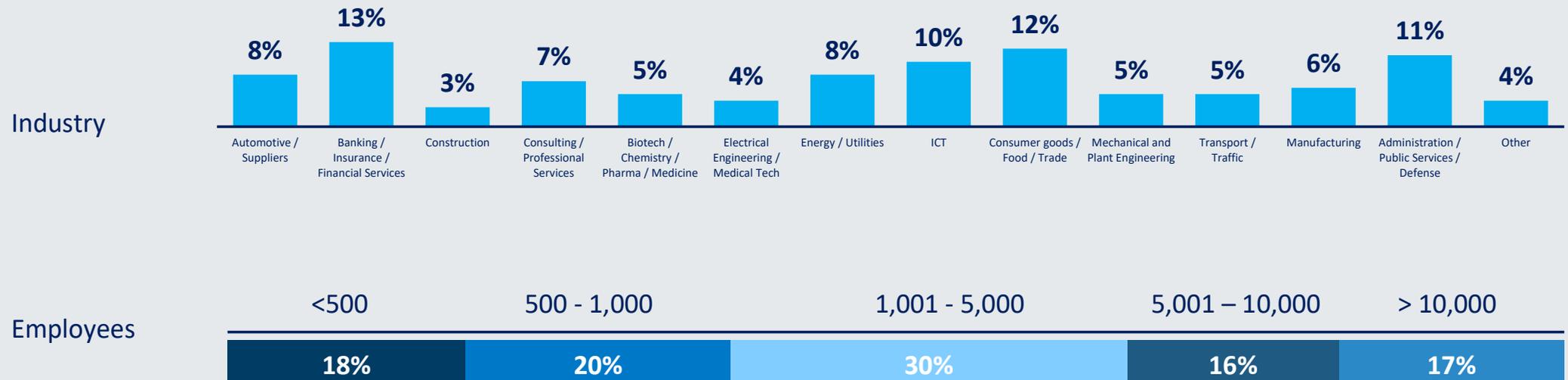
SOC - The Security Operations Centre (SOC) is a central control centre within an organisation where the IT security team monitors security around the clock to detect, analyse and resolve incidents.

Zero Trust - The Zero Trust model is a security concept whereby no device, user or service is trusted inside or outside of its network. All users and services must authenticate themselves, and network traffic is encrypted and verified.

About this survey

The 2022 IT Agenda is based on an online survey of European managers in business and IT by Metrics. A total of 186 participants were registered, for example CIOs, IT board members, buyers as well as heads of IT, of business units or projects.

Rounding differences may result in totals other than 100%.



More surveys by Metrics



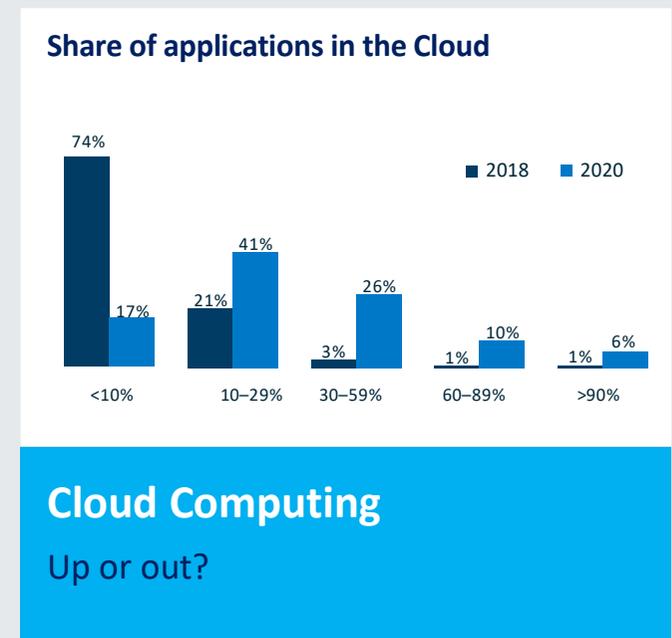
Reality Check

Agility in organisations:
Acting or authentic?



2020 IT Sourcing

Covid-19 impact on the IT organisations



Cloud Computing

Up or out?

METRICS GROUP

We are Metrics

London – Munich – St. Gallen – Vienna



Our focus is on data on IT usage in organisations - from 2001 to 2020 under the name Maturity. All data is collected from leading European companies in different industries and validated during our own projects. Metrics is driven by individual assessments of the **efficiency**, **effectiveness** and **agility** of IT - the fact-based fundamentals of strategic decisions. In short: **Data Driven Decisions**



1

Data Lake

> 20

Years of experience

> 500

Customers

> 4.000

Projects

> 60 bn €

Sourcing volume

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