

Harvey Nash/KPMG CIO Survey 2017

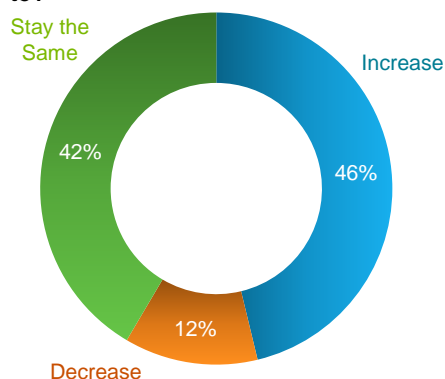
Nordic Countries Region Findings

The Harvey Nash/KPMG CIO Survey is the largest IT leadership study in the world, with almost 4,500 respondents across 86 countries, representing over US\$300bn of IT budget spend.

This Nordic countries region snapshot provides survey responses from 116 companies in Denmark, Finland, Norway and Sweden on some of the key topics, and highlights several areas where this region's responses differed significantly from those from across all geographies.

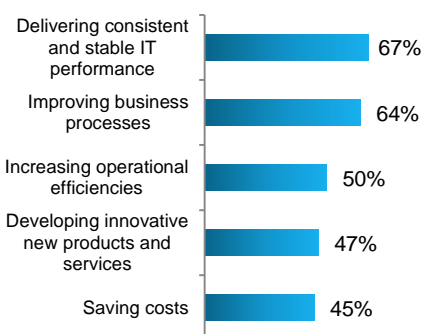
Key Topics

Looking forward, over the next 12 months, do you expect your IT budget to?



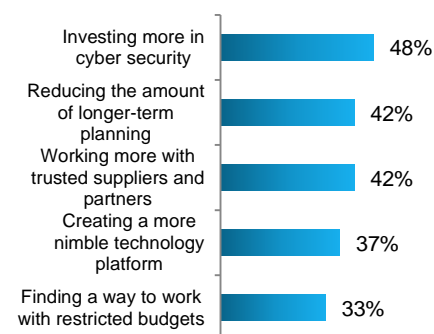
Nordic companies are **slightly more optimistic about their IT budgets for next year** than those in other regions, with the same amount expecting a budget increase (46%), and fewer expecting a decrease (12% vs. 18% globally).

What are the key business issues that your management Board are looking for IT to address? (top 5)



Compared to global peers, Nordic companies' Boards place a **higher priority on improving business processes** (64% vs. 59% globally), and a **lower priority on increasing operational efficiencies** (50% vs. 62%) and **saving costs** (45% vs. 54%).

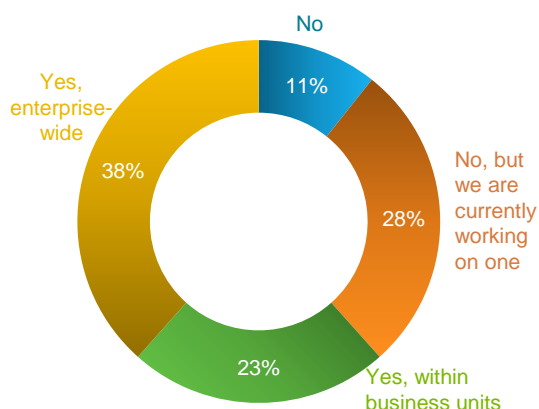
How have you adapted your technology plans to deal with uncertainty? (top 5)



To deal with uncertainty, Nordic companies are **more likely to reduce the amount of longer-term planning** (42% vs. 26% globally), and **less likely to create a more nimble technology platform** (37% vs. 52%).

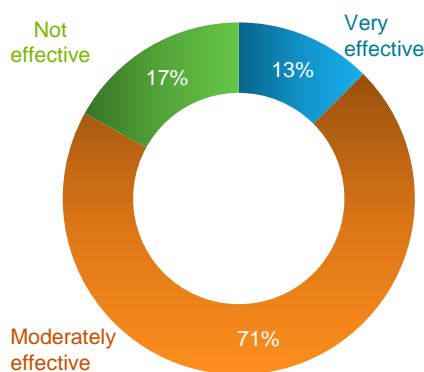
Digital Strategy

Does your organization have a clear digital business vision and strategy?



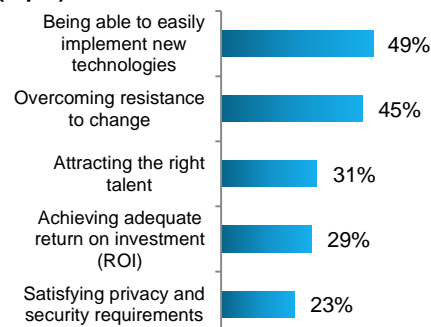
Nordic companies are **slightly less likely to maintain an enterprise-wide digital business strategy** than those in other regions (38% vs. 41% globally).

How effective has your organization been in using digital technologies to advance its business strategy?



Like their peers globally, Nordic companies **report low overall effectiveness levels in their digital strategies**, with just 13% describing their digital strategies as very effective.

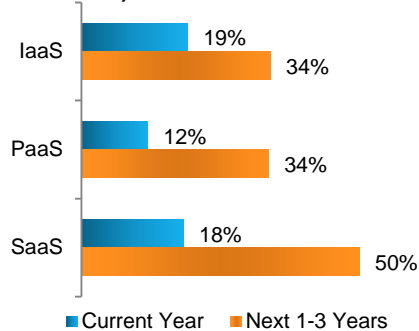
Which of the following represent the greatest challenges to your organization's successful implementation of digital capabilities? (top 5)



When implementing digital capabilities, Nordic companies **face greater challenges easily implementing new technologies** (49% vs. 39% globally), and **fewer challenges achieving adequate ROI** (29% vs. 36%).

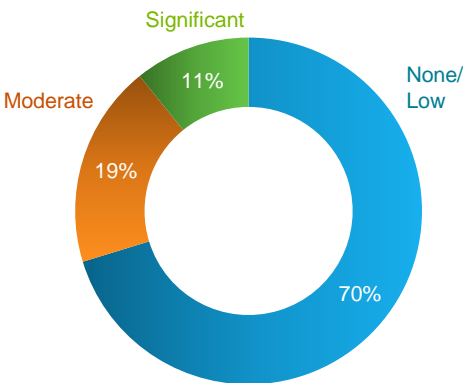
Technology & Innovation

How would you characterize your current investment in the following cloud services and how do you expect that to change over time? (Significant Investment)



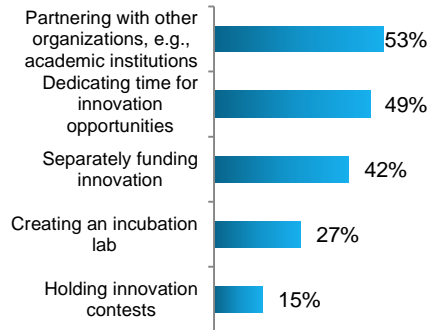
Compared to global peers, Nordic companies are **somewhat less likely to have significantly invested in cloud services**, especially SaaS (18% vs. 27% globally). Expected future investment, however, is close to the global average.

How would you characterize your current investment in digital labor?



Nordic companies **have invested more heavily in digital labor** than those in other regions, with more making both significant investments (11% vs. 9% globally) and moderate investments (19% vs. 14%).

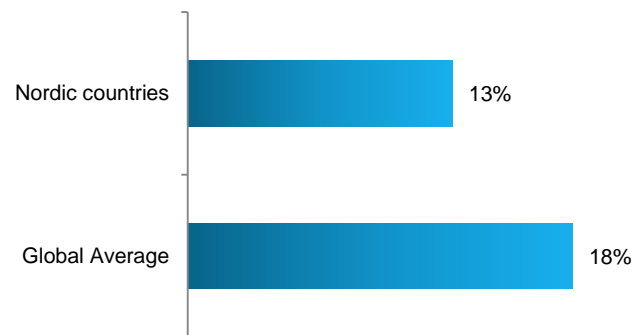
In which of the following ways is your organization fostering innovation?



To foster innovation, Nordic companies are **more likely to separately fund innovation** (42% vs. 31% globally), and are **less likely to hold innovation contests** (15% vs. 24%).

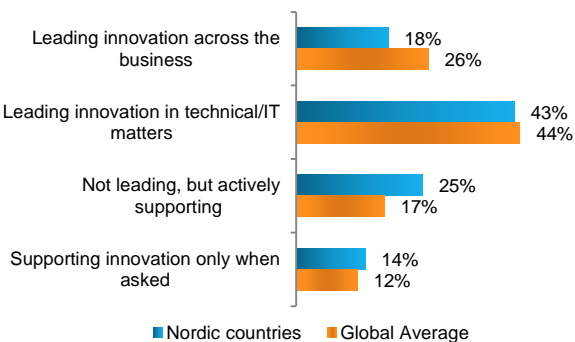
Significant Differences

Digital Leadership: How effective has your organization been in using digital technologies to advance its business strategy? (Very Effective)



Nordic countries **maintain a lower concentration of digital leaders than other regions**, with 13% of companies very effective in their digital strategies compared to 18% of companies globally.

Which of the following do you think best describes the role your organization's CIO is currently playing in promoting innovation?



Compared to their peers globally, CIOs in Nordic countries are **less likely to lead innovation across the business** (18% vs. 26%), and **more likely to take secondary roles of not leading, but actively supporting innovation** (25% vs. 17%) and **supporting innovation only when asked** (14% vs. 12%).

Conclusions

The KPMG/Harvey Nash CIO survey is a worthwhile read - also in a Nordic perspective. While the Nordic countries usually comes on top in surveys on digitization and internet connectivity, the challenges faced by IT leaders are universal and for the Nordic countries mostly at the same level as global results. However it also shows that Nordic IT leaders are less effective in implementing digital strategies and they also continuously have difficulties in implementing new technologies compared to global average. With a relative high employee cost in the Nordic countries it is perhaps less surprising that Nordic companies invest more in digital labor.

Further information

Morten Klitgaard Friis

Partner, Advisory
KPMG Denmark
T: +45 5215 0258
E: mortenklitgaard@kpmg.com

Harri Wihuri

Partner, Advisory
KPMG Finland
T: +35 8405941191
E: Harri.Wihuri@kpmg.fi

Anders Nilsson

Partner, Advisory
KPMG Sweden
T: +46 70 5583970
E: anders.nilsson@kpmg.se

Kirstine Bolstad

Director, Advisory
KPMG Norway
T: +47 40639626
E: Kirstine.Bolstad@kpmg.no



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavour to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

© 2017 KPMG International Cooperative ("KPMG International"), a Swiss entity. Member firms of the KPMG network of independent member firms affiliated with KPMG International. KPMG International provides no client services. No member firm has any authority to obligate or bind KPMG International or any other member firm vis-à-vis third parties, nor does KPMG International have any such authority to obligate or bind any member firm. All rights reserved.

The KPMG name and logo are registered trademarks or trademarks of KPMG International.