

The **2016**

Continuity Insights and **KPMG LLP**

**Global Business Continuity
Management (BCM) Program
Benchmarking Study**



About This Report

Statistics used in this report are based on anonymous survey responses from 349 executives in public and private companies, government agencies and authorities, educational institutions and not-for-profit entities.

The online survey, conducted by *Continuity Insights* during November 2015 through February 2016, explores changes to the global risk landscape, regulatory requirements and supply chain interdependencies, and compares the programs of organizations with a steering committee in place against those without a steering committee in place, highlighting some dramatic differences.

This Report is based on and generated from the KPMG LLP sponsored Survey entitled: *The 2016 Continuity Insights and KPMG LLP Global Business Continuity Management (BCM) Program Benchmarking Study*.

Research Methodology

Respondents for the *2016 Continuity Insights and KPMG LLP Global Business Continuity Management (BCM) Program Benchmarking Study* were obtained from the *Continuity Insights* subscriber base by way of its newsletter, website, email deployments and social media channels, as well as from other professional organizations that supported the study. The 25-minute online survey included 47 questions and was fielded from November 2015 through February 2016. Information was collected from 349 respondents, of which 305 respondents completed the entire survey.

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although *Continuity Insights* endeavor 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. For more information on the study methodology, please contact Robert Nakao at robert.nakao@advantagemedia.com.

About Continuity Insights

Continuity Insights is business continuity from management's perspective. It speaks directly to the strategic view, embracing the issues and concerns of senior-level managers. With its results-oriented approach, *Continuity Insights* is a discussion of the "why's" of business continuity and offers a comprehensive review of the vast continuity landscape. Its audience represents a wide range of businesses and industries, government and other public sector entities, and serves an array of professional disciplines. It's highly specialized portfolio includes *Continuity Insights* online/electronic media including its highly-trafficked website, e-Newsletters, webinars, and research project; and its annual *Continuity Insights Management Conference* and regional events.

About KPMG

KPMG LLP, the audit, tax and advisory firm (HYPERLINK "<http://www.kpmg.com/us>" www.kpmg.com/us), is the U.S. member firm of KPMG International Cooperative ("KPMG International"). KPMG International's member firms have 145,000 professionals, including more than 8,000 partners, in 152 countries. The KPMG name, logo and "cutting through complexity" are registered trademarks of KPMG International.

KPMG Information Protection and Business Resilience services help clients effectively manage and control corporate information assets across a broad spectrum of evolving threats and scenarios. Companies today increasingly realize that security is not a one-time project, but instead a strategy that must be adaptive to changing threats, remain consistent with the organization's business initiatives, and deliver benefits such as manageability, assurance, and efficiency. We help companies identify their most important information assets, and work with them to develop an effective approach combining technology and business processes. We work with clients to maximize the value that can be obtained from their data while protecting key business processes, information assets, and the company's brand and reputation.

To learn more about KPMG's Information Protection and Business Resilience, please contact:

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Acknowledgments

Continuity Insights and KPMG LLP would like to acknowledge the following organizations for their contributions in helping raise the awareness — and hence the value — of the 2016 *Continuity Insights and KPMG LLP Global Business Continuity Management (BCM) Program Benchmarking Study*.

- Association Of Contingency Planners (ACP)
- Association Of Sacramento Area Planners (ASAP)
- BC Management
- BCI-USA
- Business Continuity Institute (BCI)(UK)
- Business & Industry Council For Emergency Planning & Preparedness (BICEPP)
- Business Resumption Planners Association (BRPA)
- Canadian Security Partners' Forum
- Contingency Planners Of Ohio (CPO)
- Contingency Planning Exchange (CPE)
- Continuity Central
- Disaster Recovery Journal (DRJ)
- Disaster Resource Guide
- Forbes Calamity Prevention (Singapore/Asia)
- Global Conference On Disaster Management
- Mid Atlantic Disaster Recovery Association (MADRA)
- New England Disaster Recovery Information Exchange (NEDRIX)
- Risk & Insurance Management Society (RIMS)
- Rothstein Business Survival
- Southeastern Business Recovery Exchange (SEBRE)
- Southeastern Contingency Planners Association (SCPA)

In addition, we would like to acknowledge the subject-matter professionals that took the time to review the survey results and provide their point of view for use in this report, the companion article, and the panel discussion at the 2016 *Continuity Insights Management Conference*.

Requests for Benchmarking Reports and Key Contact

A number of custom reports are available and can be accessed on the *Continuity Insights* website. Those custom reports are:

- Annual revenue.
- Entity type (public companies, private companies, government agencies or authorities, and not-for-profits).
- Governance (Entities with an Advisory Steering Committee, Entities with no Advisory Steering Committee).
- Industries (Computers/IT hardware, software and services; Financial services; Government; Healthcare; Manufacturing; Professional services and Utilities).
- Number of employees.

If you would like to request a custom report that has not already been developed and available on the website, please provide the following information to Robert Nakao at robert.nakao@advantagemedia.com.

- Your name, organization, and e-mail address
- The type of custom report(s) you would like to receive

You will be provided the custom report(s) generally within five (5) business days of the receipt of your request.

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40. Has your organization addressed cyber terrorism in your Business Continuity Management Program and related Business Continuity Plans, Disaster Recovery Plans, and/or Crisis Management Plans?	15
41. How frequently does your organization carry out full scenario testing of its disaster recovery plan involving relevant people, processes and technologies?	15
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43. Regarding your organization’s disaster recovery strategies in the cloud, please indicate which strategies your organization has currently implemented:	16
44. What percentage of application data is stored in the cloud?	16
45. When did your organization last conduct any tests of the IT Disaster Recovery Plans with representatives from other key stakeholder companies or agencies (e.g. supply chain partners, service providers, public sector agencies)?	17
46. For which of the following capabilities does your Disaster Recovery plan have documented procedures and written guidelines?	17
47. What types of ongoing business continuity management training have your organization’s employees utilized?	18

1. Does your enterprise use survey results to generate or enhance executive support for your Business Continuity Management (BCM) program?

YES – 46%

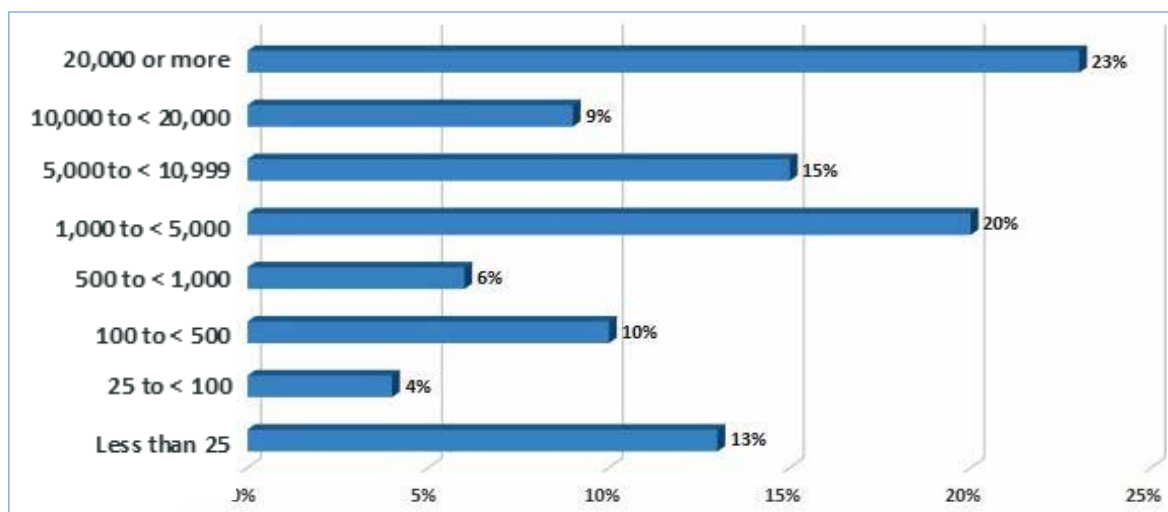
NO – 54%

2. Which best describes your primary type of industry?

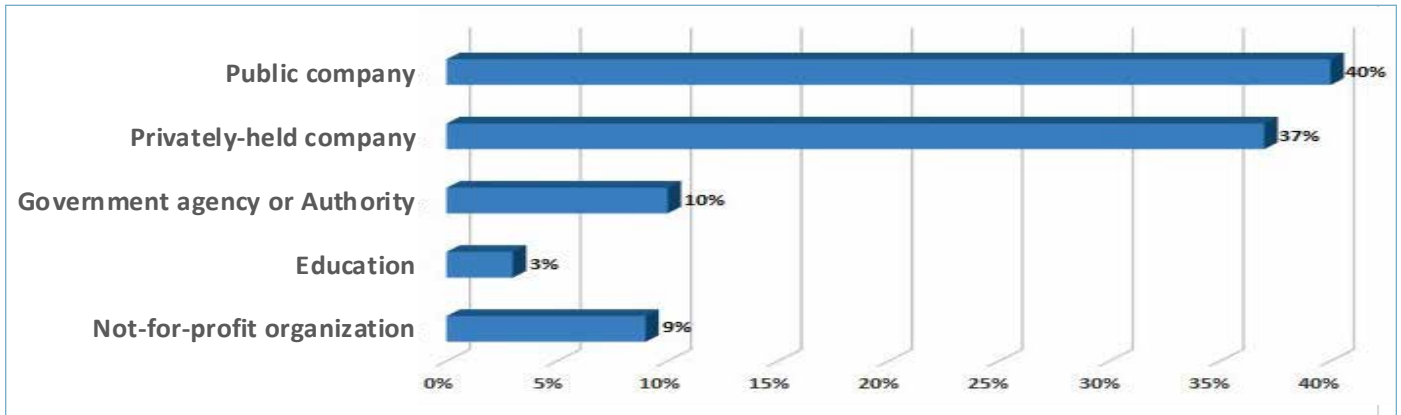
Aerospace/Defense	2%
Automotive	0%
Biotechnology	1%
Chemical/Petroleum	0%
Communications/Media	1%
Computer/Information Technology Telecommunications	3%
Computer/Information Technology Software	2%
Computer/Information Technology Services	3%
Education	4%
Entertainment/Media	1%
Financial Services – Banking	14%
Financial Services – Brokerage	1%
Financial Services – Credit Card	1%
Financial Services – Investment	4%
Financial Services – Mortgages	2%
Government	7%
Healthcare Medical – Hospital	1%
Healthcare Medical – Service Provider	2%
Insurance	8%

Manufacturing – Consumer Goods	2%
Manufacturing – Industrial Goods (Non-technology)	3%
Manufacturing – Medical Devices/Other Healthcare Products	2%
Not for Profit Organization	3%
Pharmaceuticals	2%
Power (Oil and Gas)	2%
Power (Generation/Transmission)	1%
Professional Services (Business Continuity/Operational Risk Consulting)	6%
Professional Services (Other)	5%
Retail	4%
Transportation – Aviation	1%
Transportation – Mass Transit	0%
Transportation – Shipping	0%
Transportation – Trucking	1%
Utilities	4%
Wholesale Distributors	1%
Other	7%

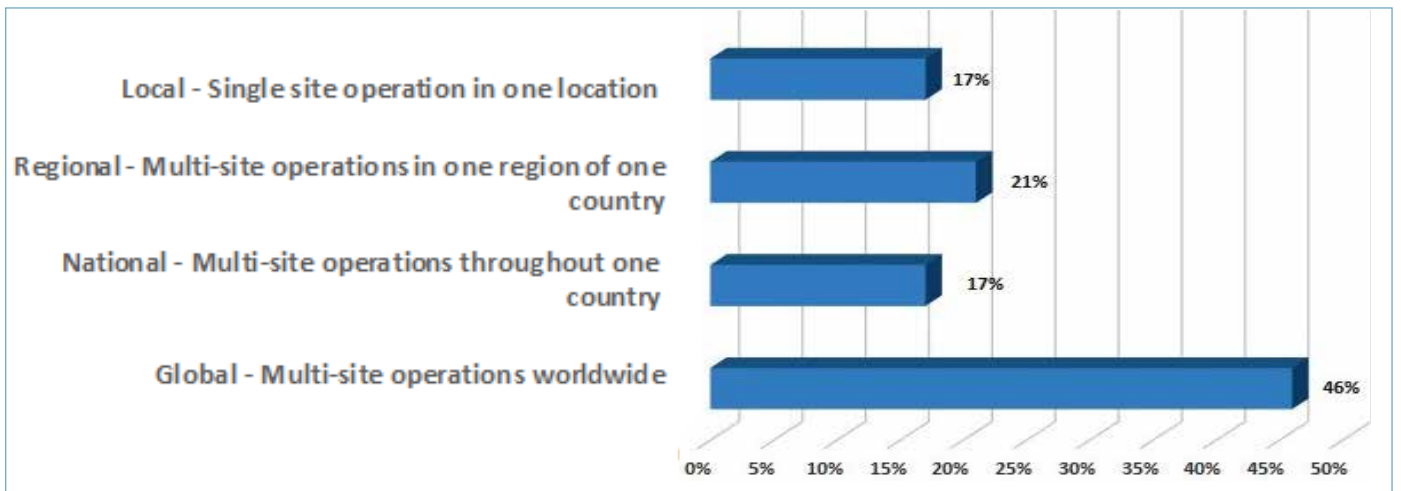
3. How many people are employed by your organization (all locations)?



4. Which best describes your organization, entity, or enterprise?



5. How would you describe the geographical range of your operations?



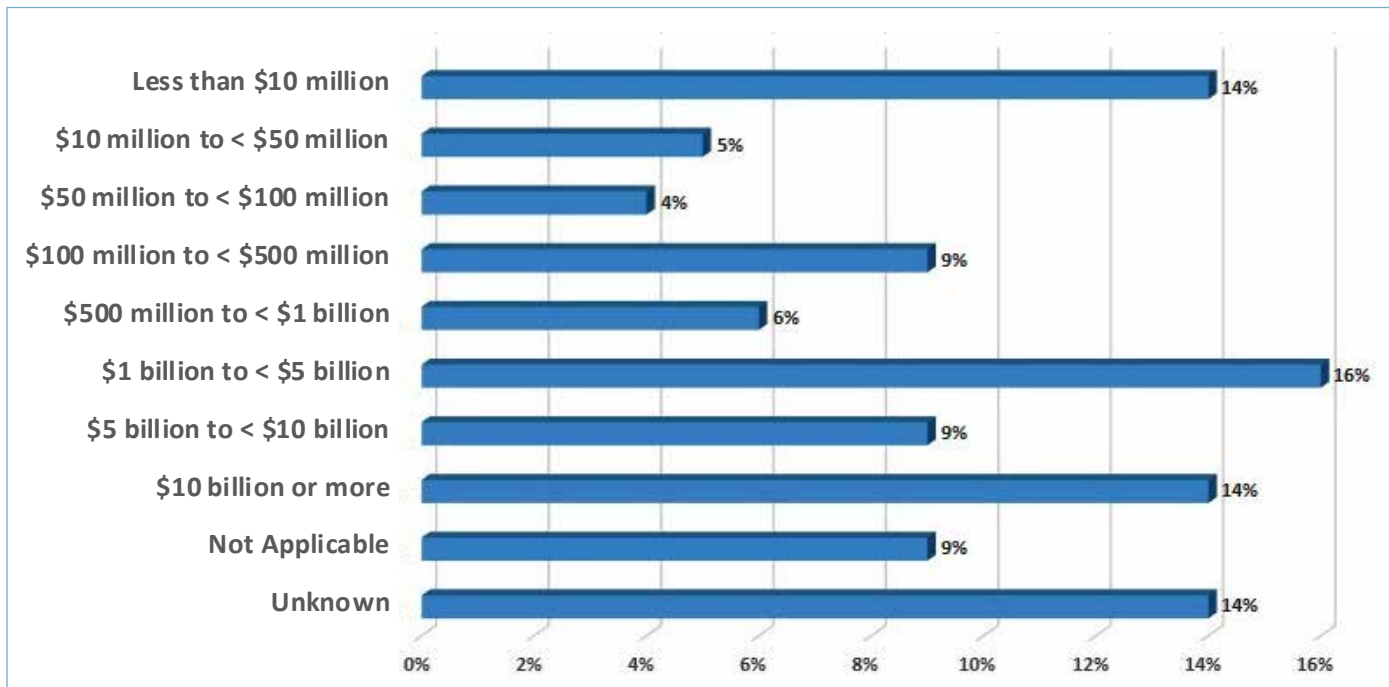
6. Are your headquarters operations AND your primary data center located in the same building or the same campus?

YES – Same Building 41%
YES – Same Campus 15%
NO – 44%

7. If your organization has operations in multiple countries, in what country is your organization's headquarters located?

Brazil	1%	Asia Pacific – Other (Specify)	4%
Canada	5%	France	1%
United States	65%	Germany	1%
Americas – Other (Specify)	4%	The Netherlands	2%
Australia	3%	Spain	1%
Singapore	0%	Switzerland	2%
South Korea (Republic of Korea)	0%	United Arab Emirates	0%
Taiwan	0%	United Kingdom	6%
Turkey	0%	Europe, Middle East, and Africa – Other	4%

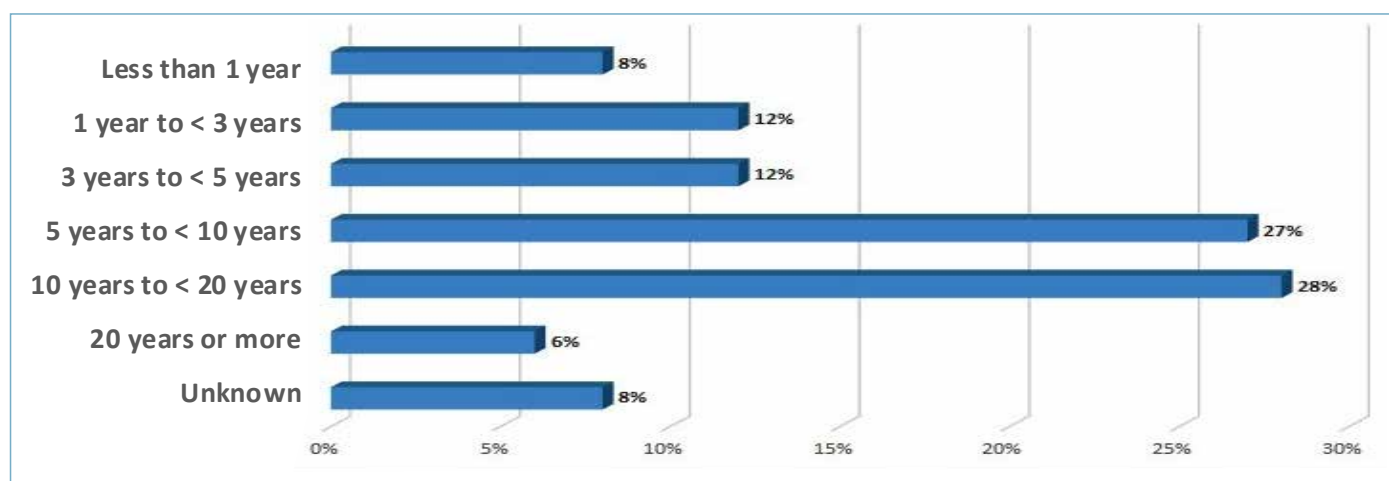
8. What is your company's approximate annual revenue in (\$US) for the last fiscal year (FY15)? (Government agencies, please select Not Applicable) ?



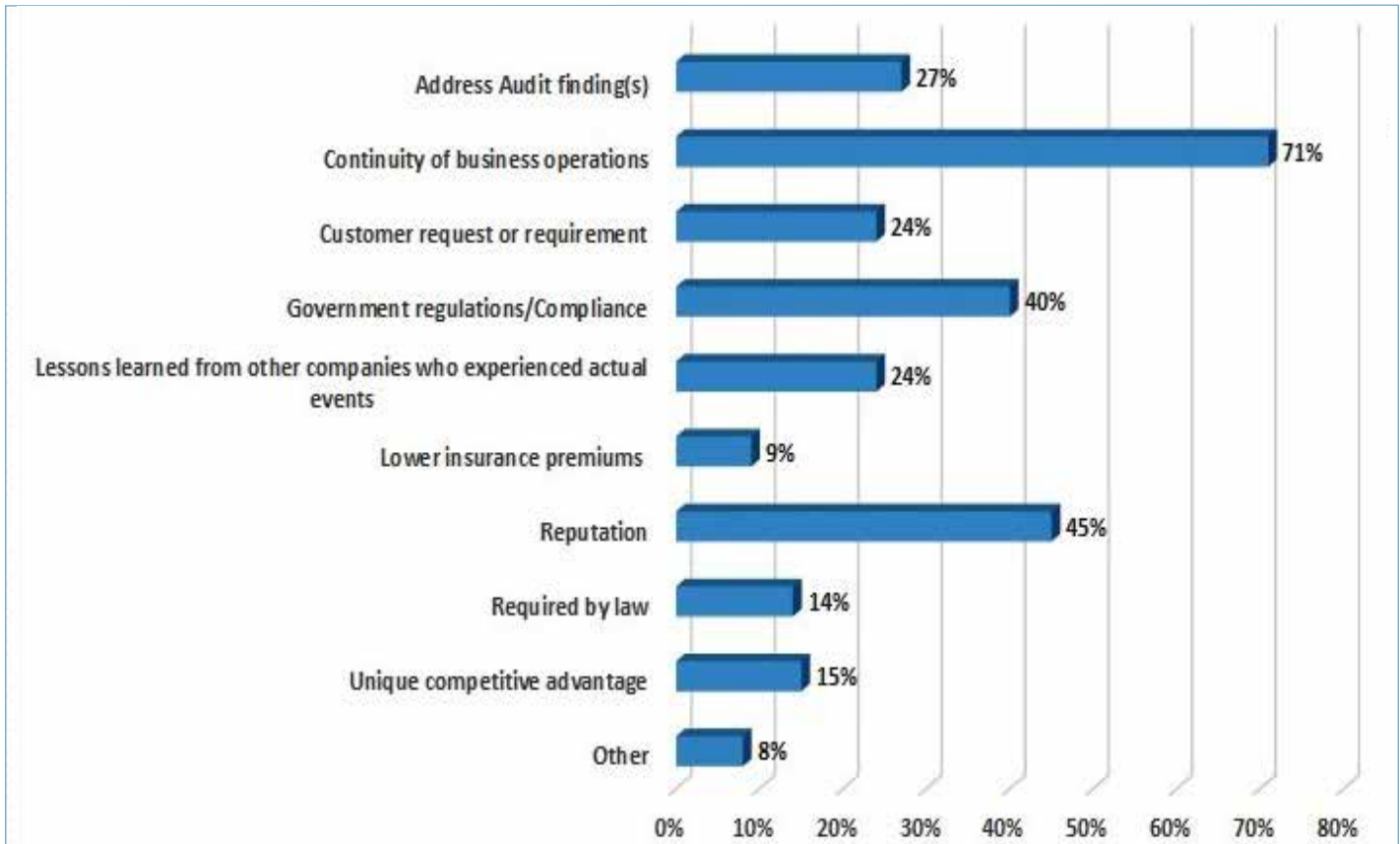
9. Which best describes your primary job function?

Business Continuity Management or Business Resilience Management in Business Unit/Site/Support Group	13%	Enterprise Risk Management	4%
Business Continuity Management or Business Resilience Management in Corporate Program Office	38%	Employee Health and Safety	0%
Compliance/Internal Audit	2%	Facilities Management/Real Estate	1%
Consultant/Analyst	8%	Finance/Accounting	1%
Corporate Executive	8%	Insurance/Liability Management	0%
Crisis Management/Emergency Management	5%	IT Disaster Recovery (IT DR) Planning	9%
		Legal	1%
		Security Management	3%
		Other	8%

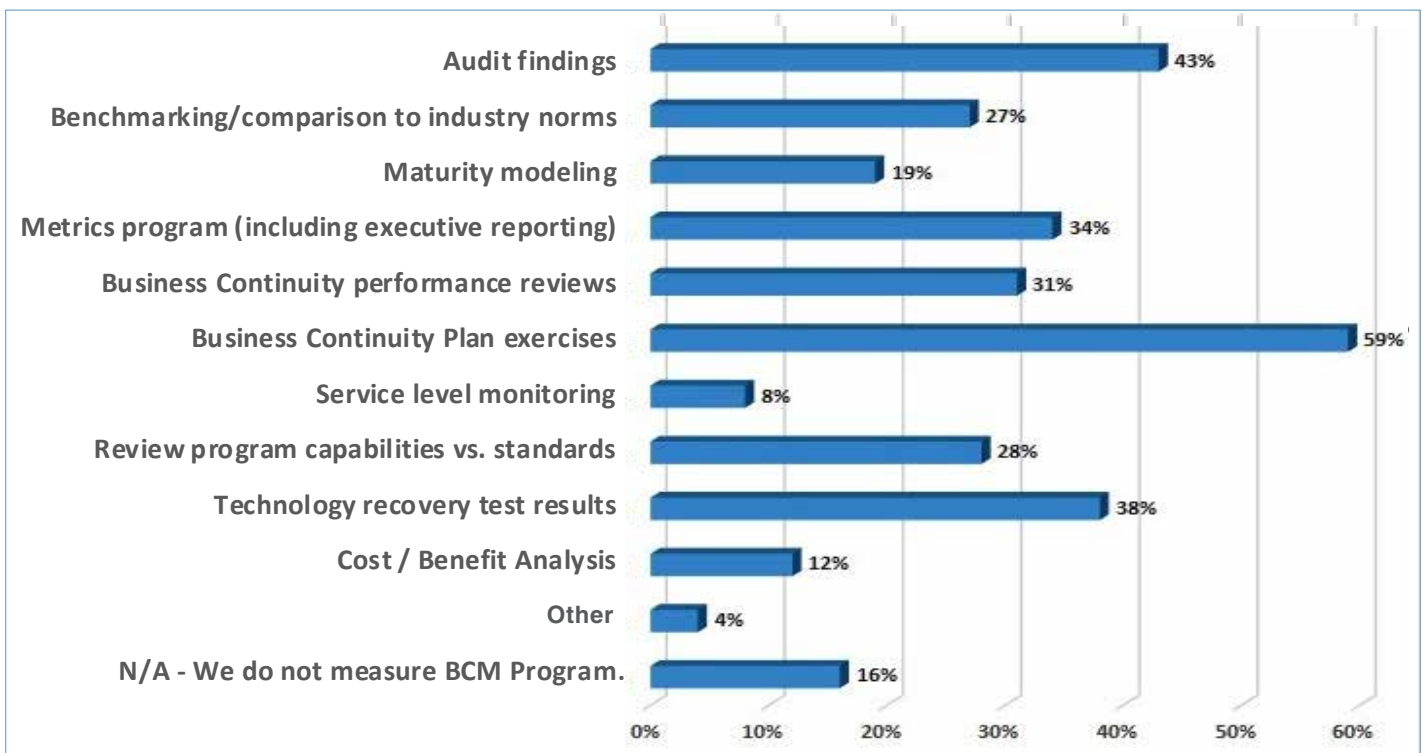
10. How long has the BCM Program been in place in your organization?



11. What are the primary reasons that your organization has established a BCM Program?



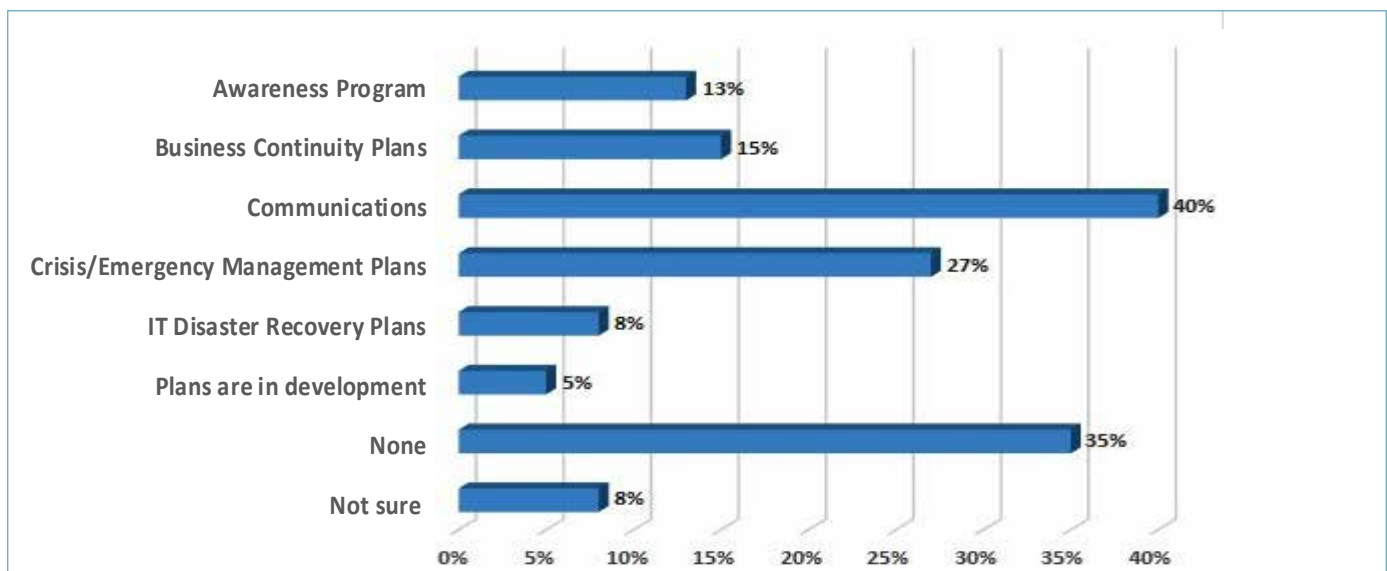
12. How does your organization measure the performance of your BCM Program?



13. In addition to any regulatory requirements that your organization may be required to meet, please list the business continuity standard(s) that your organization is using to support your BCM Program? Please list standards (Example: ISO 22301, NFPA 1600, FFIEC, Not Applicable, etc.).

NFPA 1600	11.3%	ISO	0.7%
SPC.1-2009, ASIS International – Organizational Resilience: Security, Preparedness and Continuity Management System	0.7%	ISO 22313	2.1%
All have been considered.	0.7%	ISO 22301	28.9%
AS9100 Rev C	0.7%	ISO 27001	1.4%
BCI	1.4%	ISO 31000	1.4%
Because we primarily support government clients, we base our operations on US HSPD-20/FCD-1. By extension, I believe we are in compliance with ISO 22301	0.7%	ISO 9000	0.7%
BS 11200:2014	2.1%	ISO/SAFR	0.7%
BSI 25999	0.7%	ITIL V3	0.7%
CMU CERT Resilience Management Model	1.4%	N/A	13.4%
CSA Z 1600	2.8%	NIST	0.7%
DRII	0.7%	NIST SP 800-34	0.7%
Emergency Management Accreditation Program (EMAP)	0.7%	None	5.6%
FEMA CGCs 1 and 2	0.7%	Not Sure	0.7%
FEMA COOP	0.7%	PCI-DSS certifications where applicable.	0.7%
FFIEC	6.3%	SAE Quality Management Systems – Requirements for Aviation, Space and Defense Organizations	0.7%
FINRA	0.7%	SIFMA	1.4%
FINRA 4370	0.7%	SOX 404	0.7%
FISMA	0.7%	SSAE16	0.7%
GOVERNMENT CODE SECTION 8555-8561, Article 15 of the California Emergency Services Act	0.7%	State emergency management agency guideline.	0.7%
GPG2013	0.7%	UAE guidance on BCM	0.7%
		Water Research Foundation (WRF) Guidelines for Business Continuity for Water Utilities	0.7%
		Z1600	0.7%

14. Is your organization utilizing social media in any of the following plans?



15. Does your organization have a designated full time or part time lead BCM Program Coordinator authorized to administer and keep the BCM Program current?

FULLTIME – 65%

PARTTIME – 22%

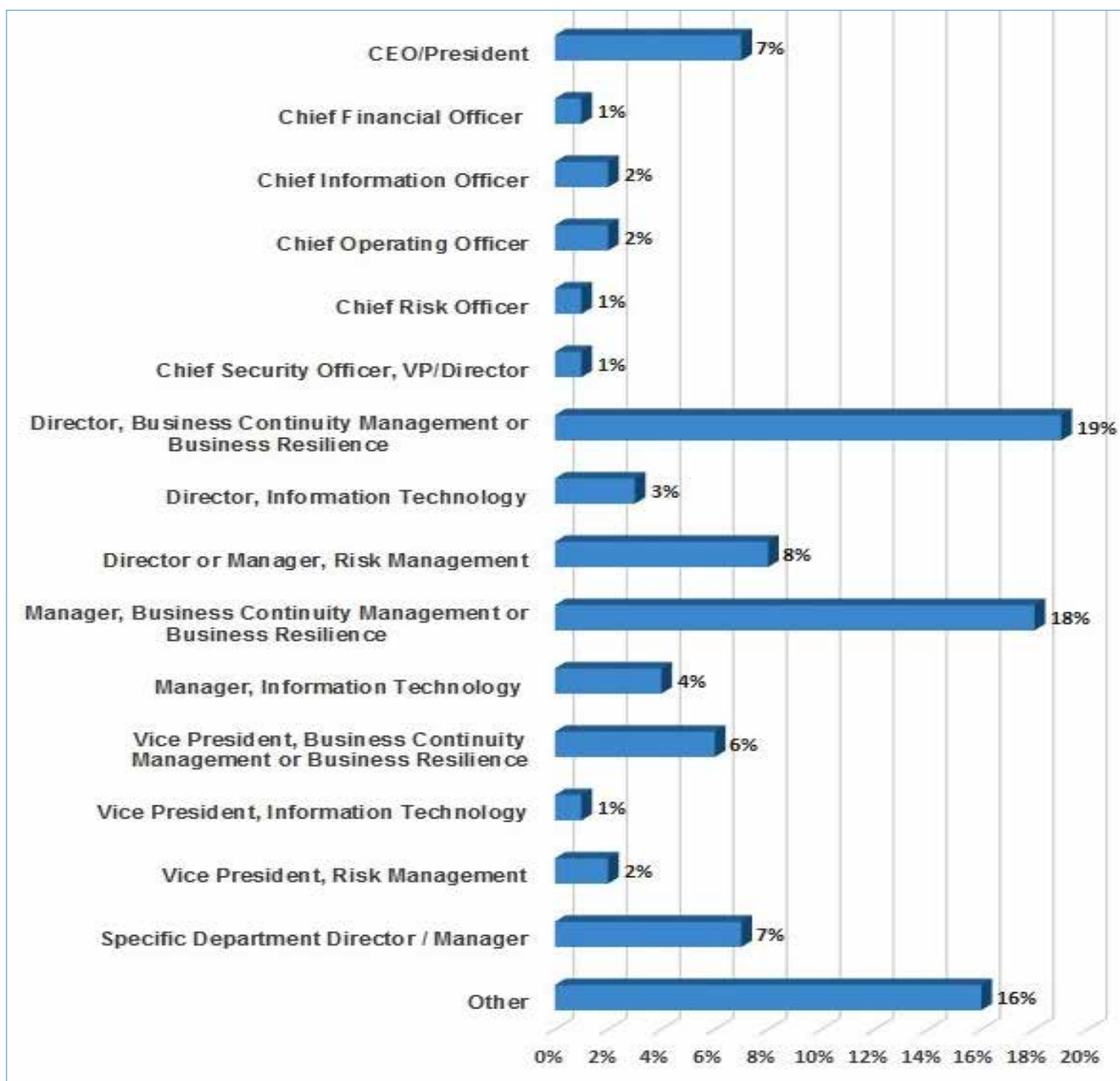
NO – 13%

16. Does your organization have a Senior Management Advisory or Steering Committee that provides input and assistance to the lead BCM Program Coordinator and BCM Program Coordination Team in the preparation, implementation, evaluation and revision of your organization’s BCM Program?

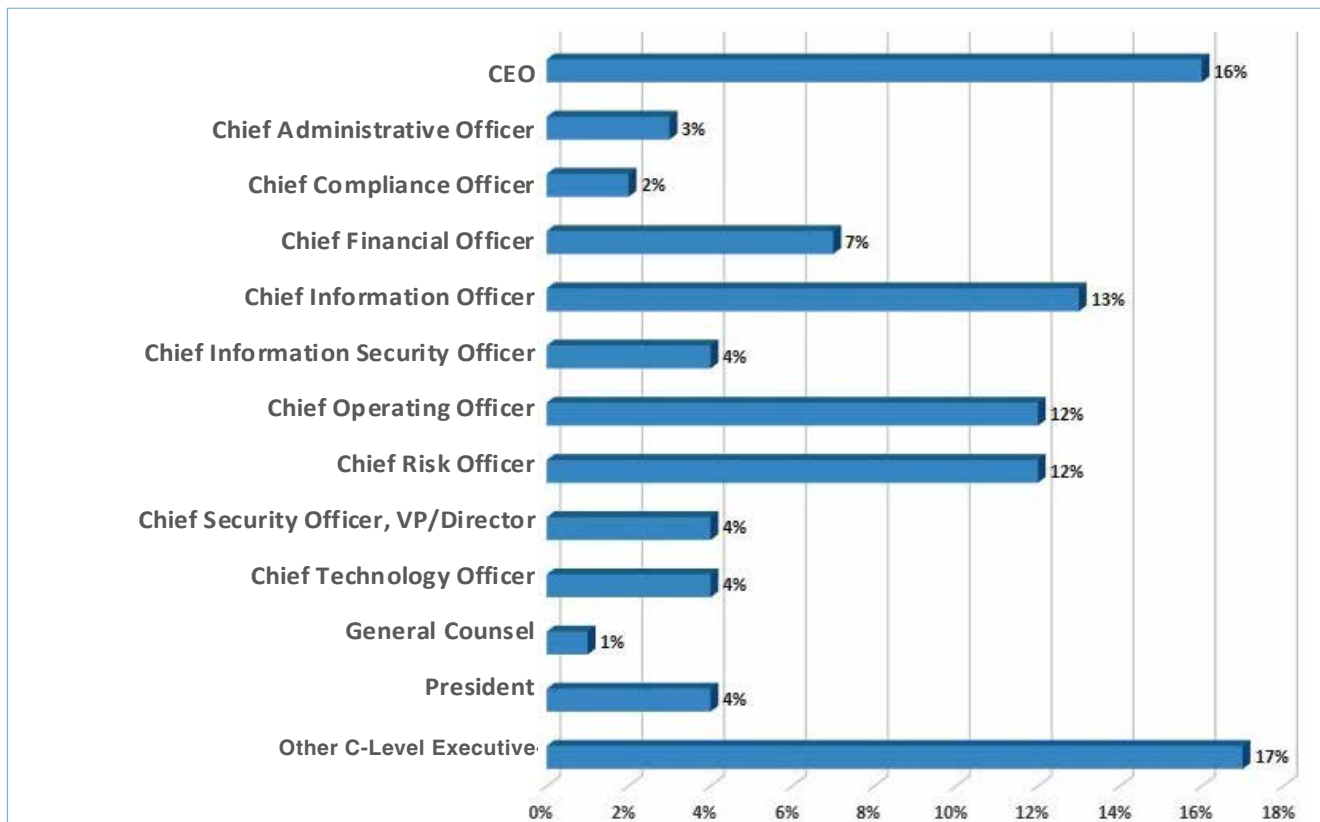
YES – 64%

NO – 36%

17. Which best describes the job title of the lead BCM Program Coordinator?



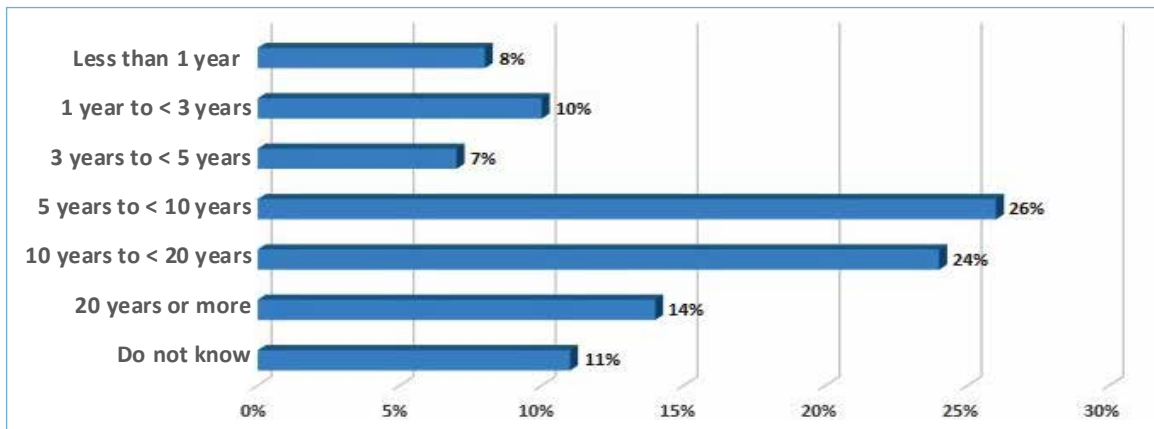
18. Which best describes the C-Level executive with ultimate reporting responsibility for your BCM Program?



19. Please identify any certifications that your organization seeks from employees that lead your program or have a significant role in your program: (Select all that apply)



20. Please identify the number of years of BCM program leadership experience of your BCM Program leader has (Leading a Program).



21. For the following question, please estimate the number of Full Time Equivalent (FTE) headcount who are dedicated to your BCM program in your Corporate Program Office AND in your various Business Units/Functions (including contractors).

	0 FTEs	1 to 2 FTEs	3 to 5 FTEs	6 to 9 FTEs	10 to 20 FTEs	More than 20 FTEs	I don't know
Information Technology/ Disaster Recovery	12.6%	45.5%	14.2%	4.7%	4.7%	5.9%	12.3%
Crisis Management	32.4%	35.2%	9.5%	3.6%	3.6%	4.0%	11.9%
Various Business Units/ Functions	35.2%	22.9%	8.3%	4.7%	6.3%	10.7%	11.9%
Corporate BCM Program Office	16.2%	47.4%	17.0%	5.9%	5.5%	1.6%	6.3%

22. Please estimate the total budget for the staff that is in place across the organization (i.e. in your Corporate Program Office AND in the organization's business units and corporate functions (excluding contractors). Use the Total Equivalent Headcount estimates from your response to the table in the previous question and use estimated loaded salaries, benefits, travel and living expenses (combined).

	Less than \$50,000	\$50,000 to <\$100,000	\$100,000 to <\$250,000	\$250,000 to <\$500,000	\$500,000 to <\$1 million	\$1 million to <\$5 million	\$5 million or more	I don't know
BCM Program Third-Party Consultants (Include program assessments, improving capabilities, etc.)	43.1%	10.3%	7.1%	2.4%	1.2%	0.8%	0.8%	34.4%
Information Technology/ Disaster Recovery (employees)	17.4%	15.0%	15.4%	8.7%	3.6%	2.8%	4.0%	33.2%
Crisis Management (employees)	34.8%	10.7%	10.7%	4.7%	3.2%	1.2%	0.8%	34.0%
Various Business Units/ Functions (employees)	30.8%	9.1%	11.5%	4.3%	3.2%	2.4%	1.2%	37.5%
Corporate BCM Program Office (employees)	22.9%	12.3%	19.0%	11.1%	6.7%	5.5%	1.2%	21.3%

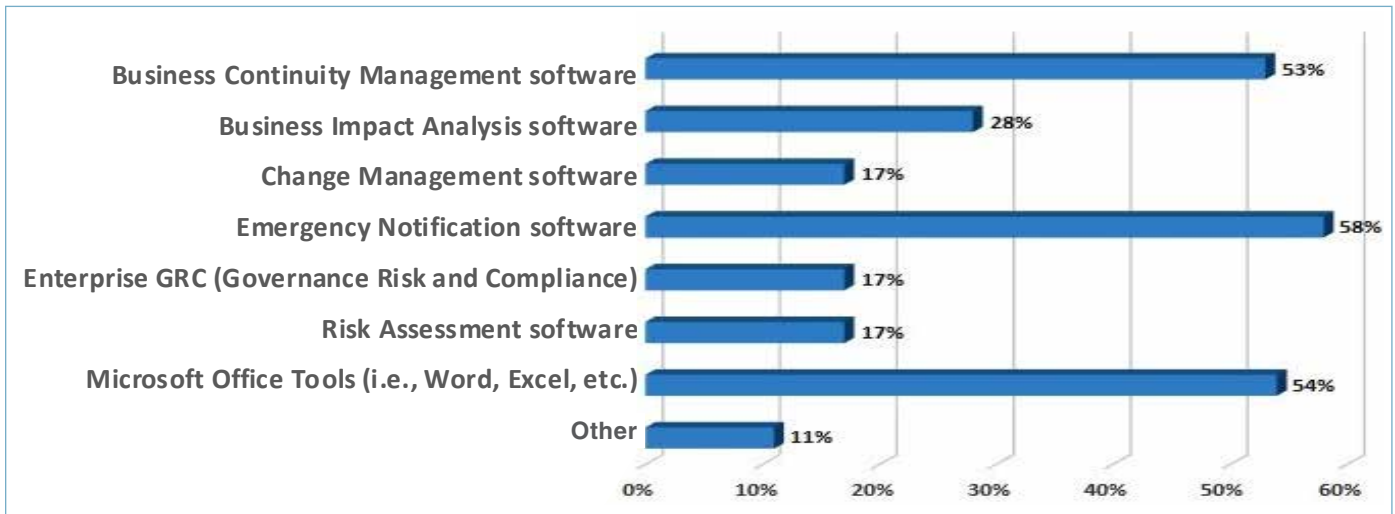
23. Please estimate individually your organization's additional budget for the following components of your BCM Program.

	Less than \$50,000	\$50,000 to <\$100,000	\$100,000 to <\$250,000	\$250,000 to <\$500,000	\$500,000 to <\$1 million	\$1 million to <\$5 million	\$5 million or more	I don't know
BCM Software and Hardware (Include plan-related document repository and emergency notification solutions)	41.5%	18.2%	12.3%	4.3%	2.0%	1.2%	1.2%	19.4%
Work Area Recovery (Include recovery site costs, third-party service providers, etc.)	37.9%	13.0%	9.1%	5.9%	2.4%	2.4%	2.0%	27.3%
IT Disaster Recovery Costs (Include hardware, software, internal recovery capabilities, 3rd party service provider fees, etc.)	20.6%	7.9%	5.9%	11.9%	7.9%	7.1%	5.5%	33.2%
Training and Awareness Programs (Include internal training and related costs, external training, registration fees, travel and living expenses for conference attendance, etc.)	54.9%	14.2%	5.1%	3.2%	0.4%	0.4%	0.0%	21.7%
BCM Program Exercises (Include planning, conducting exercises, third-party participation, travel and living expenses, etc.)	50.2%	13.0%	8.3%	3.2%	1.6%	2.0%	0.0%	21.7%

24. Which statement best describes how funds are allocated for BCM Program related initiatives?

On a case-by-case basis based on individual needs	33%
As an individual line item in each functional budget	17%
On a hybrid chargeback basis with a base fee plus additional usage charges	2%
As a percentage of the IT budget	14%
As a percentage of the risk management budget	14%
As a percentage of the individual functional budget	5%
I don't know	4%
Other	11%

25. Indicate the BCM Program-related software type packages your organization has implemented or plans on implementing in the next year.



26. Which statement best describes your organization's current BCM program status?

There is no business continuity management program in place	6%
We are currently in the process of establishing a BCM Program, defining program governance, scope, objectives, budgeting and format for plans	8%
We are currently in the Assessment phase (i.e. Risk Assessment, Business Impact Analysis, Strategy Selection, etc.) for the first time in the program's lifecycle	6%
We are currently developing Business Continuity Plans, Crisis Management Plans and Disaster Recovery Plans	17%
We have a BCM Policy, Senior Management Steering or Advisory Committee, Business Continuity, Crisis Management and Disaster Recovery Plans in place and have developed a process for updating those plans on a regular basis to reflect changes in the business and lessons learned from exercises, tests or real events	63%

27. In your opinion, how would you rate the maturity of your organization's program?

Level 1 (Self Governed) – The state of preparedness is generally low across the enterprise	12%
Level 2 (Supported Self Governed) – Senior Management may see value in a BCM Program but they are unwilling to make it a priority at this time	14%
Level 3 (Centrally Governed) – A BCM Program Office or Department has been established which centrally delivers BCM Program governance and support services to the business units and other departments within the organization	23%
Level 4 (Enterprise Awakening) – Senior management understands and is committed to the strategic importance of an effective BCM Program. All business continuity plans are updated routinely	23%
Level 5 (Planned Growth) – A multi-year plan has been adopted to “continuously raise the bar” for planning sophistication and enterprise wide state of preparedness	21%
Level 6 (Synergistic) – Cross functional coordination has led participants to develop and successfully test upstream and downstream integration of their business continuity plans	8%

28. Does your organization maintain and foster relationships with external government agencies to ensure the recovery of your organization during a disaster?

YES – 52%

NO – 34%

DON'T KNOW – 14%

29. Are mission critical 3rd party service providers required to show evidence they have a viable BCM Program?

YES – 58%

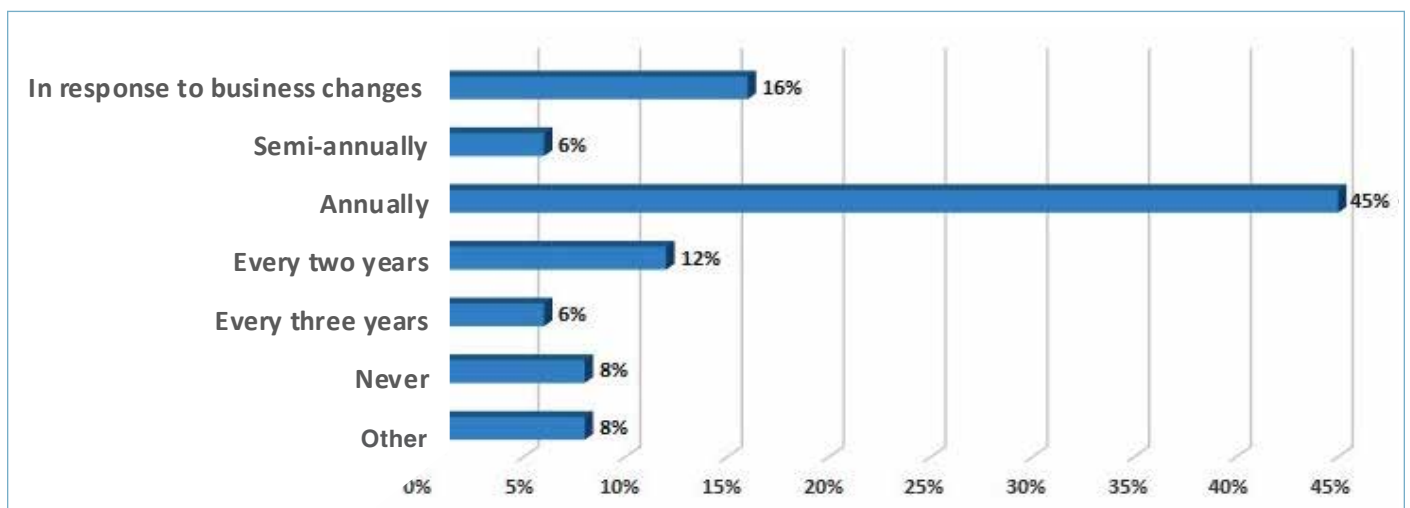
NO – 25%

DON'T KNOW – 17%

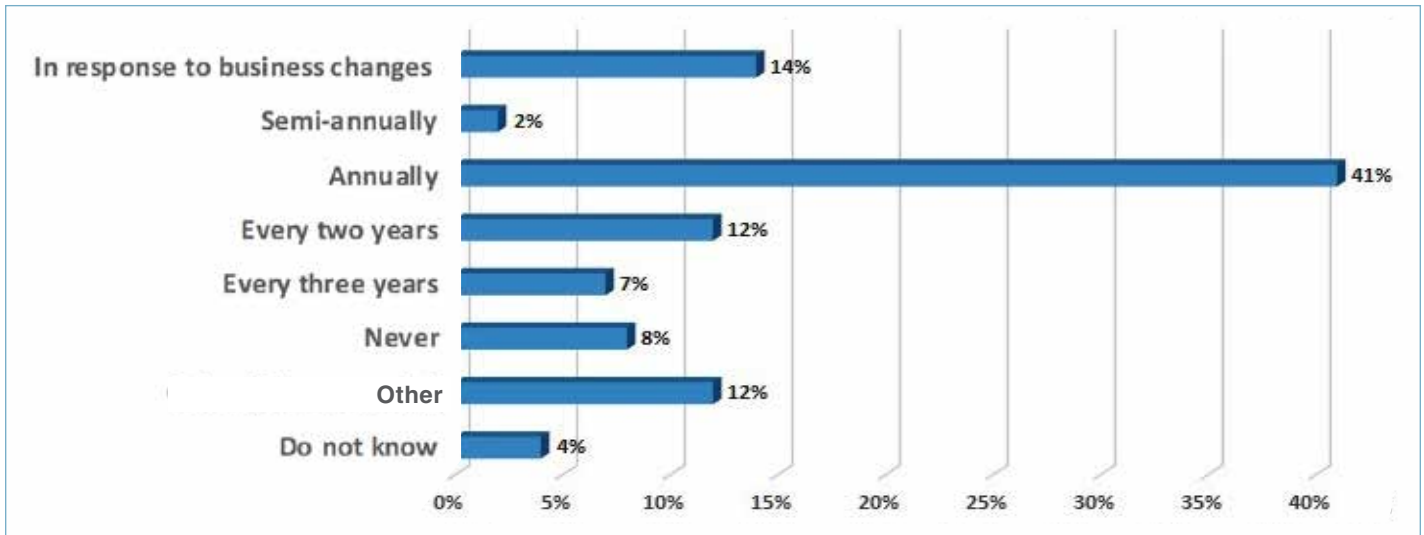
30. How well integrated is the BCM Program with the following capabilities? (Scale 1-4)

	Extremely	Very much	Somewhat	Not at all	N/A	Mean
Compliance/Audit	17.3%	38.6%	34.5%	9.5%	11.6%	2.67
Corporate Security	24.0%	39.7%	28.4%	7.9%	8.0%	2.43
Crisis Management	38.5%	37.2%	18.4%	6.0%	6.0%	2.1
Employee Health and Safety	18.5%	37.5%	32.8%	11.2%	6.8%	2.55
Enterprise Risk Management	23.2%	36.4%	32.5%	7.9%	8.4%	2.48
Facilities/Real Estate Management	15.4%	37.3%	39.5%	7.9%	8.4%	2.62
Information Technology Management	34.0%	40.0%	22.6%	3.4%	5.6%	2.12
Information Security Management	26.9%	35.9%	29.9%	7.3%	6.0%	2.35
Management of Insurance Coverage	11.7%	31.1%	40.1%	17.1%	6.8%	2.88
Relationships with Public Authorities (Police, Fire, EMS, Local Emergency Management Agencies, etc.)	13.0%	28.7%	40.0%	18.3%	7.6%	2.82
Relationships with Third Party Service Providers (Utilities, Telecom, Information Technology Service Providers or Business Process Service Providers)	9.1%	32.6%	42.6%	15.7%	7.6%	2.83
Strategic Planning	10.1%	22.9%	43.6%	23.3%	8.8%	3
Strategic Sourcing/Procurement	7.6%	24.1%	46.4%	21.9%	10.0%	3.04

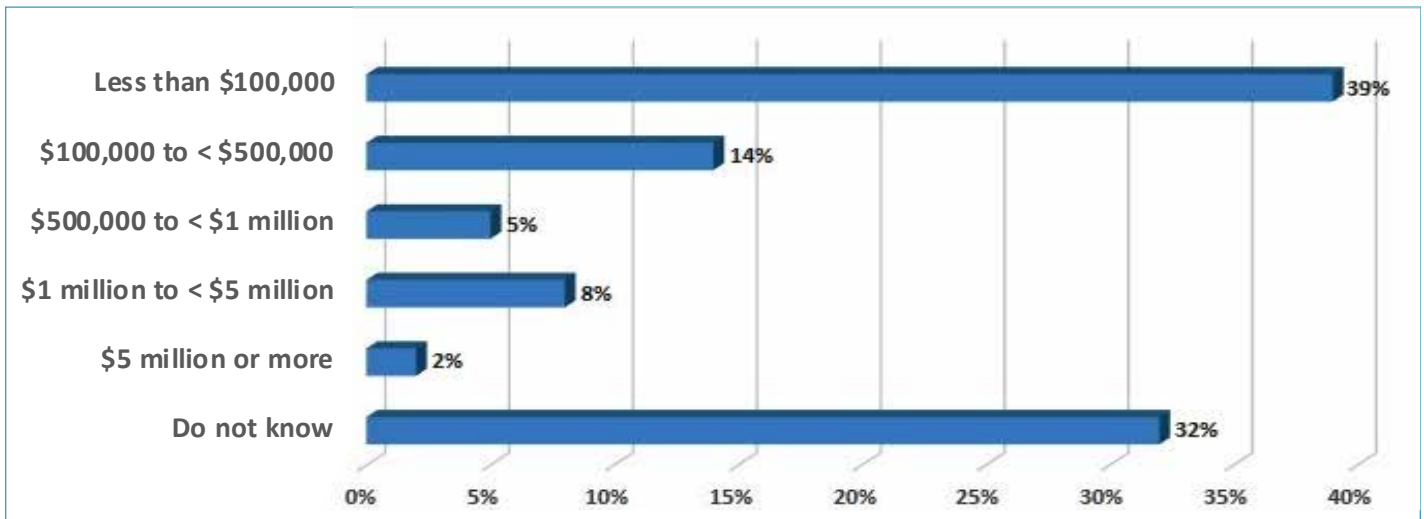
31. How often does your organization conduct Risk Assessments?



32. How often does your organization conduct a Business Impact Analysis (BIA)?



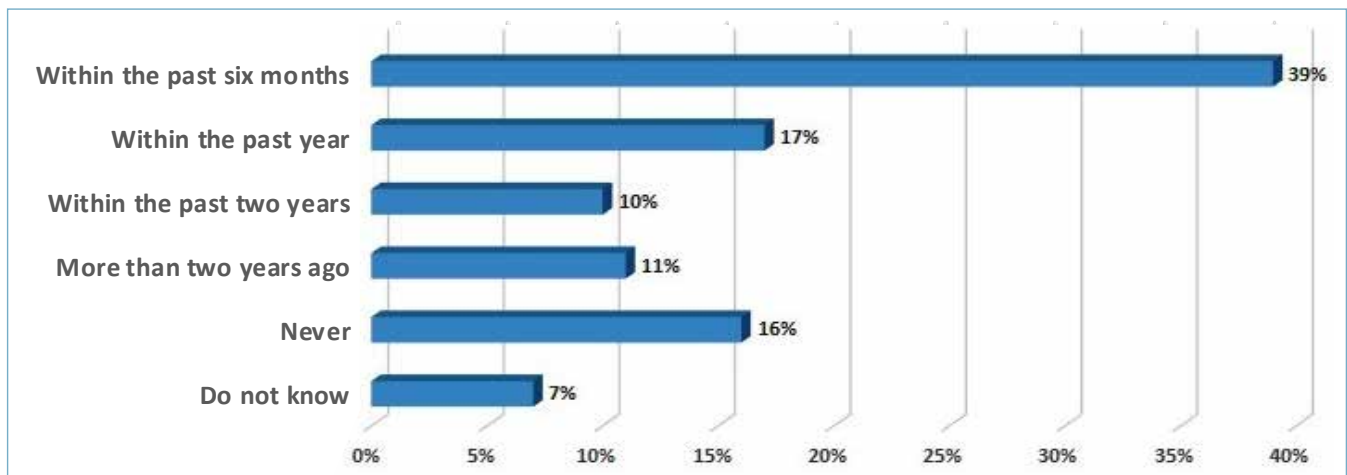
33. How much would you estimate business disruptions have cost your organization in both outlays and internal (soft) costs in the past 12 months? Please consider the estimated costs of delayed or canceled product and service revenues from existing offers as well as new products and services delayed or canceled, lifetime cost of lost customers and erosion/loss of brand value.



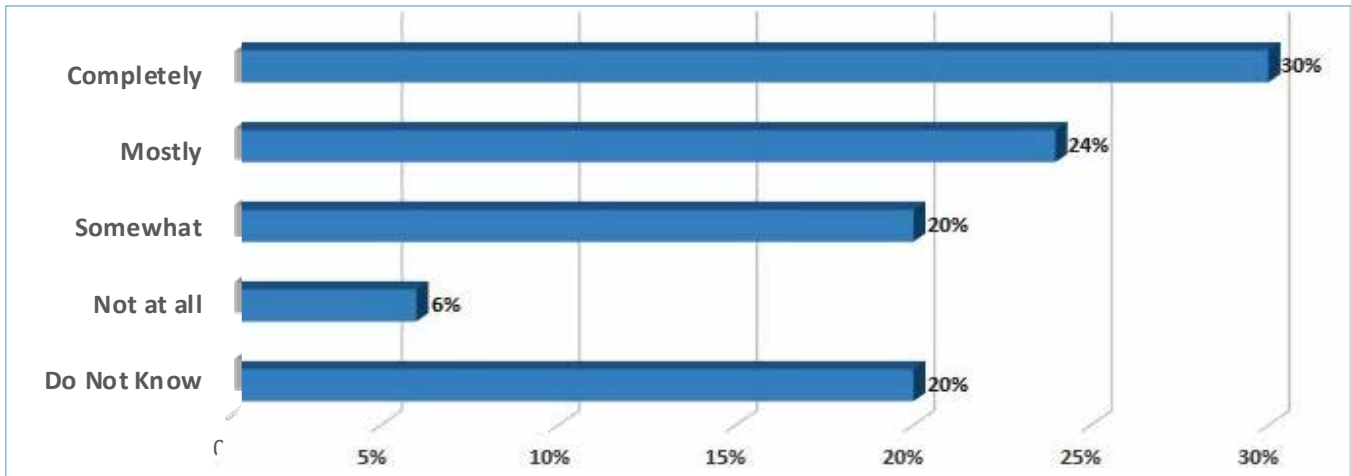
34. Has your organization experienced an incident or interruption in the past year that caused you to activate any documented business continuity plans, crisis management plans or disaster recovery plans?

	Yes	No
Civil Unrest	17.5%	82.5%
Cyber (i.e., Breach, DoS, etc.)	26.4%	73.6%
Earthquake	10.6%	89.4%
Fire	17.5%	82.5%
Flood	26.4%	73.6%
Indirectly Due to Supplier Issues or High Profile Neighbor	12.2%	87.8%
IT Related – Change Management Issue, Data Corruption, Denial of Access, Virus, IT Security, etc.	31.7%	68.3%
IT Related – Hardware/Software in Production	31.3%	68.7%
IT Related – Telecommunications (i.e., Voice, Data, Converged, etc.)	37.4%	62.6%
IT Related – Third Party Service Provider in Production (Hosted Solution)	22.8%	77.2%
IT Related – Upgrade/Scheduled Outage	34.1%	65.9%
Power Outage	47.6%	52.4%
Privacy	11.8%	88.2%
Severe Weather (i.e., Hurricane, Tornado, Winter Weather, etc.)	53.3%	46.7%
Social Media Related	7.7%	92.3%
Terrorist Attack	10.6%	89.4%
Theft	16.3%	83.7%

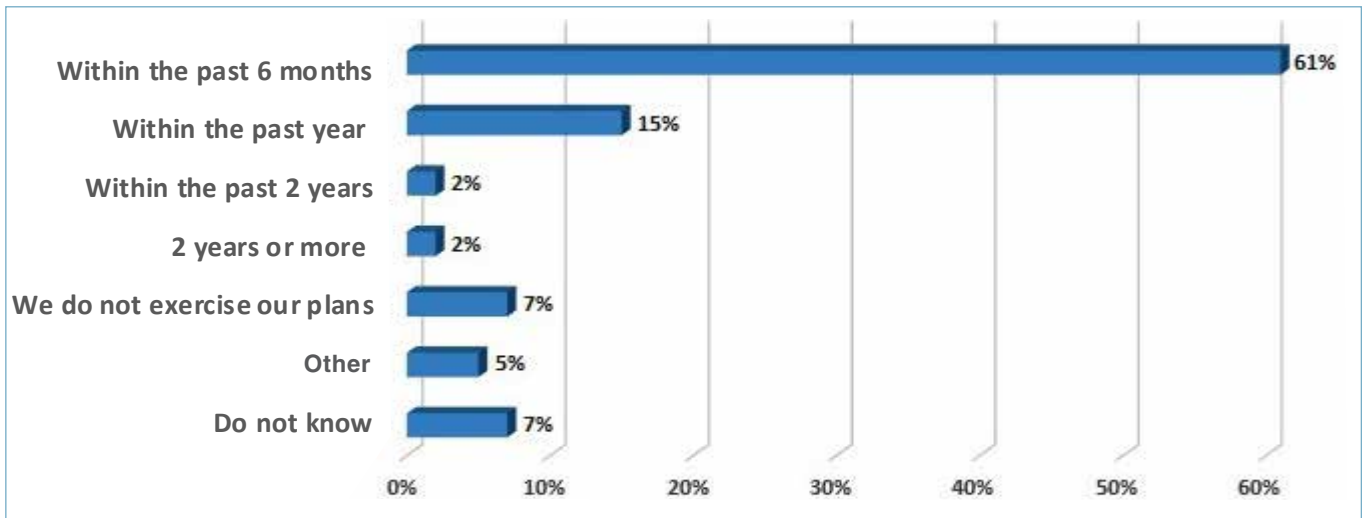
35. When was the most recent interruption requiring you to activate one or more business continuity plans?



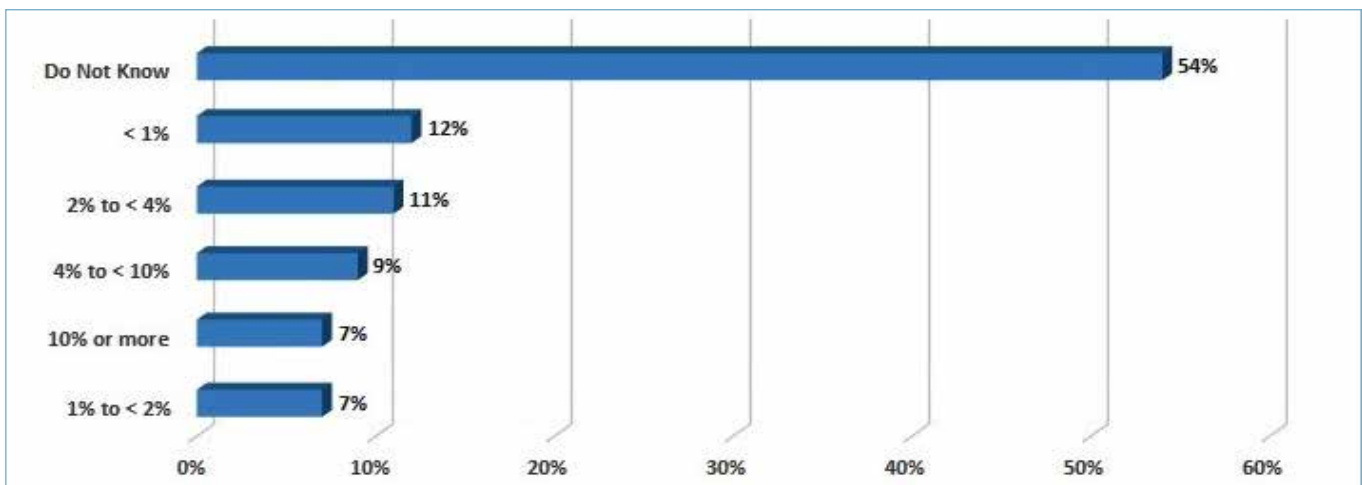
36. For the most recent interruption that required you to activate one or more business continuity plans, how well was your recovery time objectives met?



37. When was the most recent Business Continuity Plan exercise?



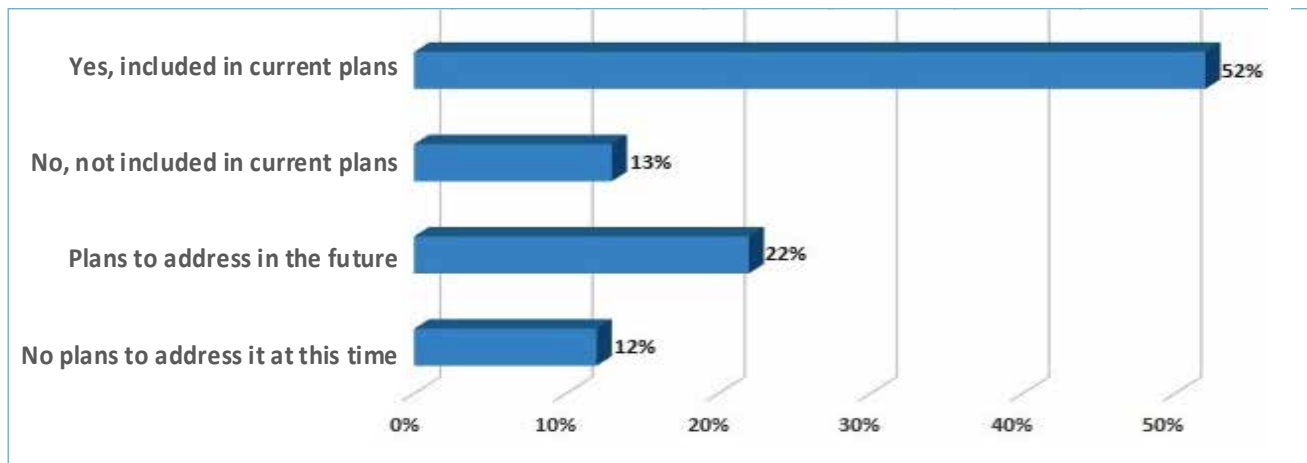
38. What percentage of your Information Technology budget does your organization spend on disaster recovery capabilities?



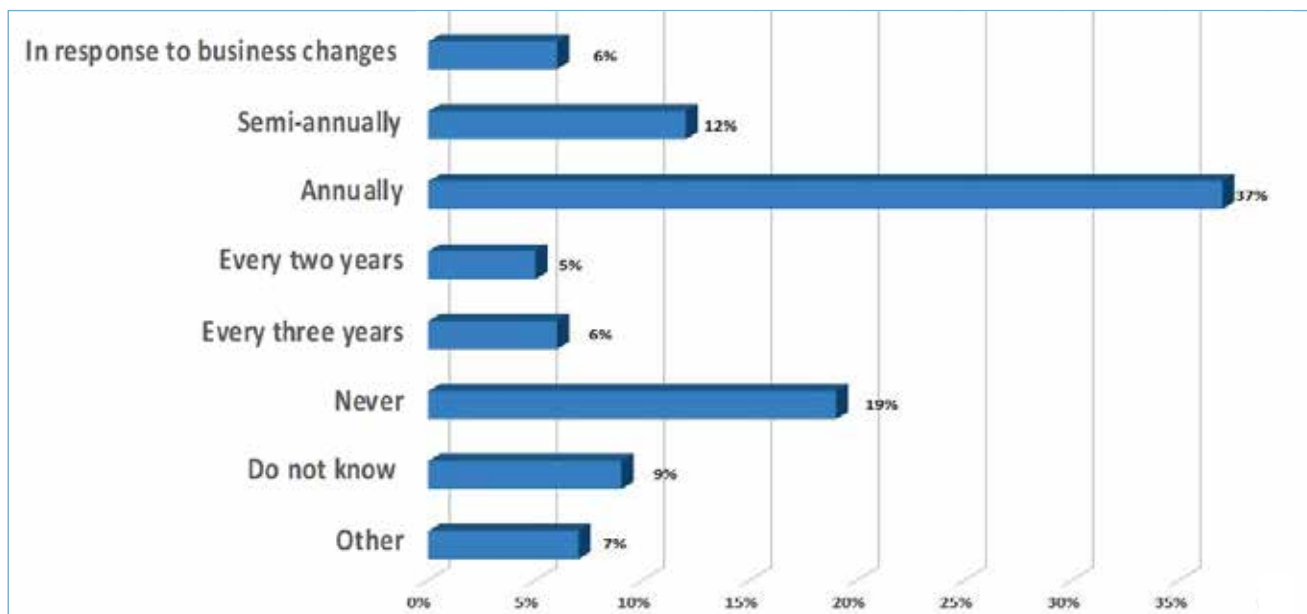
39. Which statement best describes the status of your organization's "bring your own device" (BYOD) program?

There is no BYOD Program in place and the organization has no plans to establish one	44%
We are currently in the process of establishing a BYOD Program in the next year	10%
We have established a BYOD Program that includes some implementation issues that we are addressing at this time	10%
We have successfully established a BYOD Program that includes smartphones only	10%
We have successfully established a BYOD Program that currently includes smartphones with plans to include laptops and/or tablets	6%
We have successfully established a BYOD Program that includes laptops, tablets and smartphones	19%

40. Has your organization addressed cyber terrorism in your Business Continuity Management Program and related Business Continuity Plans, Disaster Recovery Plans, and/or Crisis Management Plans?



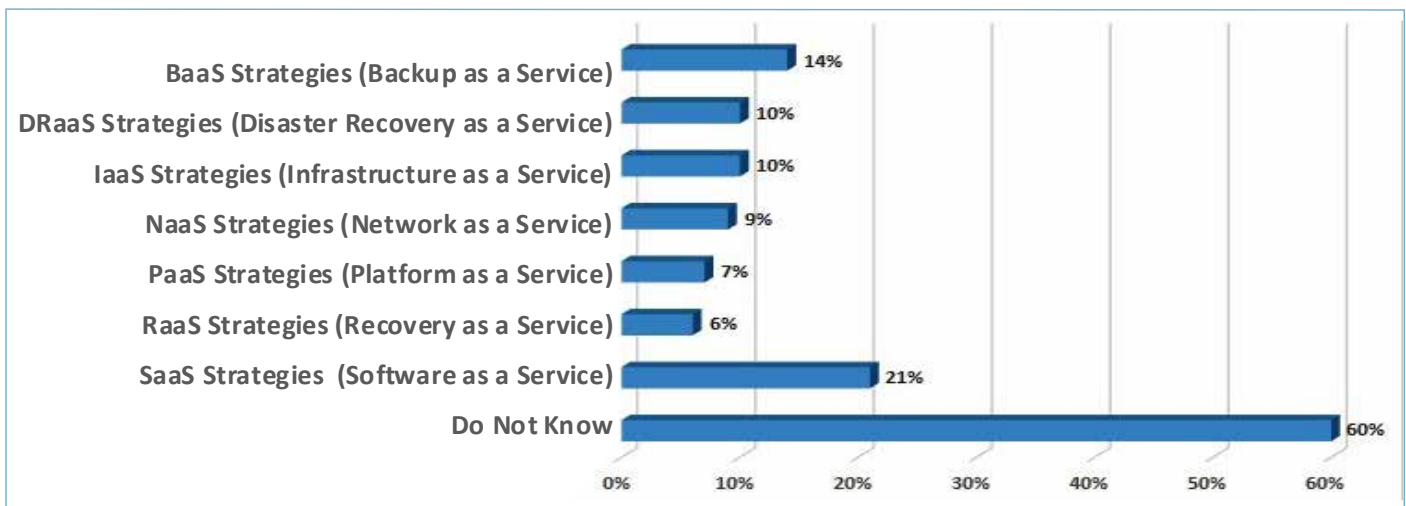
41. How frequently does your organization carry out full scenario testing of its disaster recovery plan involving relevant people, processes and technologies?



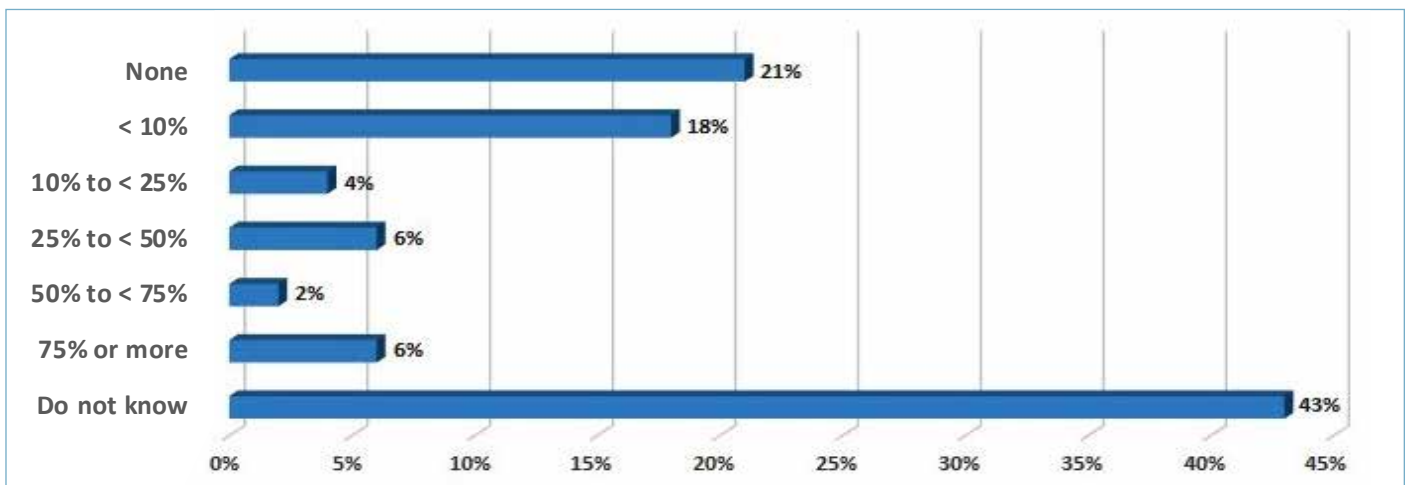
42. What is your current IT recovery strategy?

Internal – Hardware and Software Solution	45%
External – Hardware and Software Solution	22%
Combination/Hybrid of Internal and External Solutions	50%
Move certain capabilities to a Public Cloud Vendor	8%
Move certain capabilities to a Private Cloud Solution	22%
Other	5%
None	2%

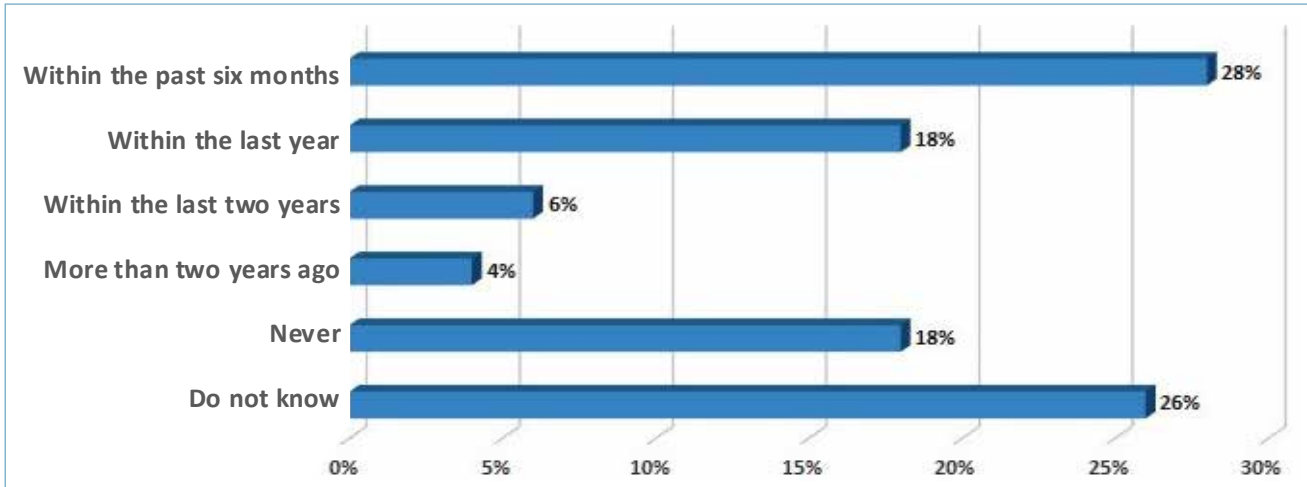
43. Regarding your organization's disaster recovery strategies in the cloud, please indicate which strategies your organization has currently implemented:



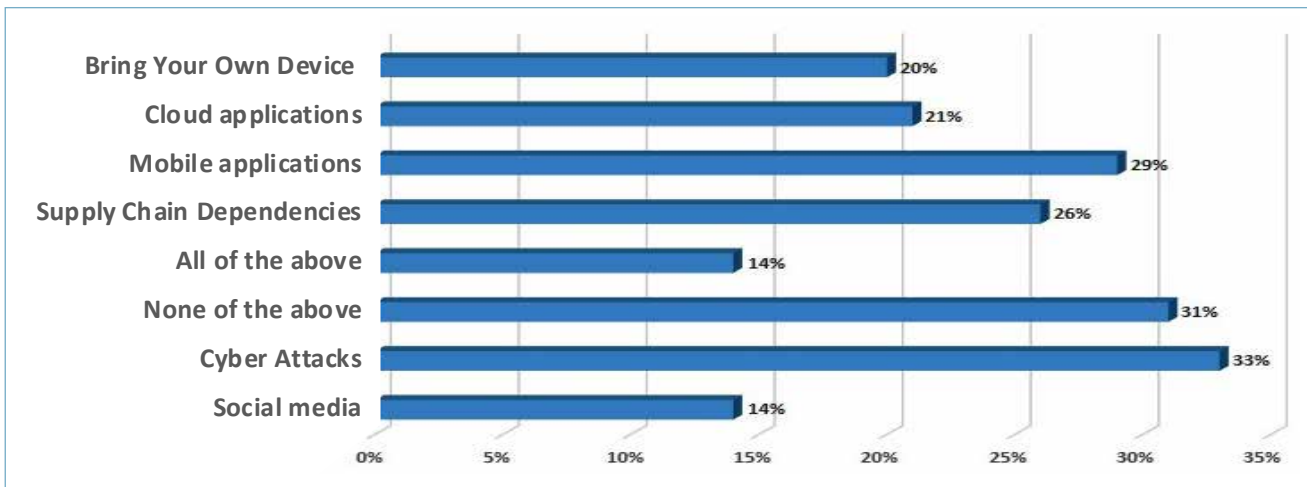
44. What percentage of application data is stored in the cloud?



45. When did your organization last conduct any tests of the IT Disaster Recovery Plans with representatives from other key stakeholder companies or agencies (e.g. supply chain partners, service providers, public sector agencies)?



46. For which of the following capabilities does your Disaster Recovery plan have documented procedures and written guidelines?



47. What types of ongoing business continuity management training have your organization's employees utilized?

