2013 Cisco Global IT Impact Survey

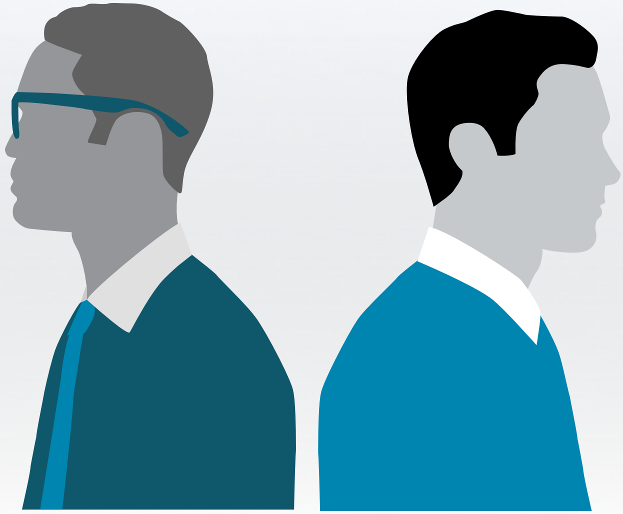
Summary and Analysis of Worldwide Results

To learn more, go to
www.cisco.com/go/impactsurvey

Executive Summary: 2013 Cisco Global IT Impact Survey

IT and Business Alignment

Engagement ≠ Alignment



Network As Application Enabler

Apps on the Rise

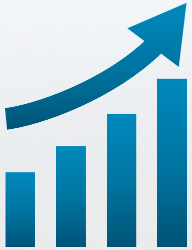
SaaS | Email | BYOD | Video | Web

Warning

Network Not Ready

IT Technology Opportunities

IoT = $ £ € ¥



SDN

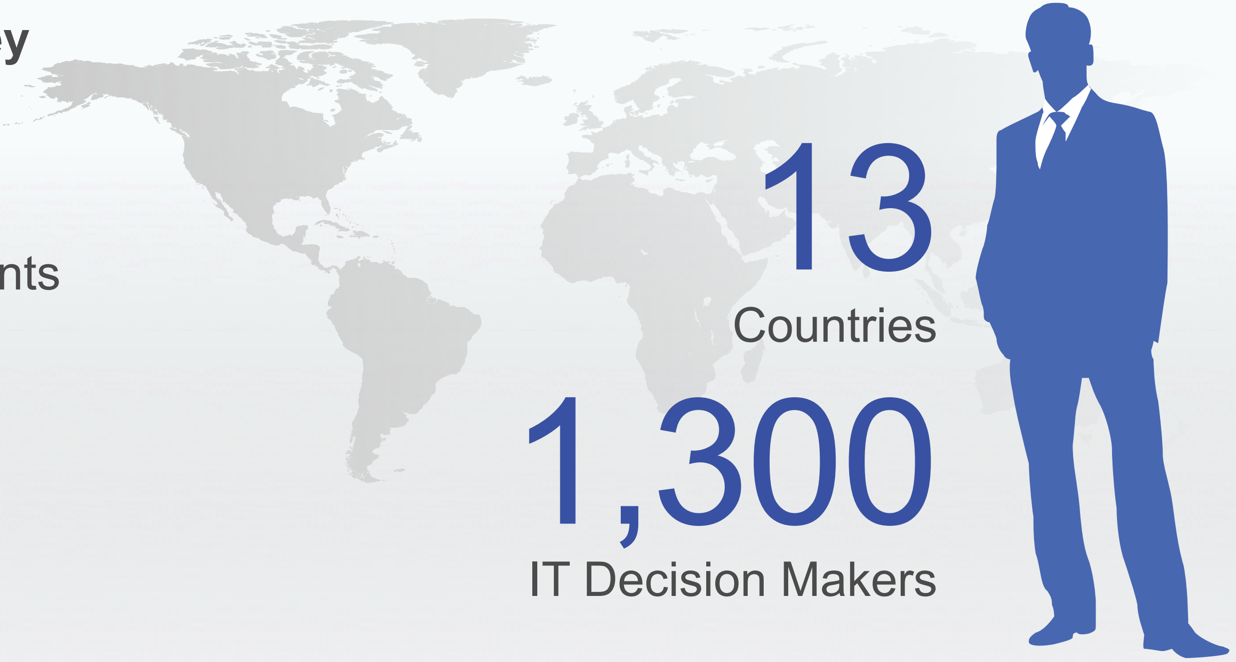
Automate + Lower Costs

Survey identifies IT challenges aligning
business goals and **technology transformations**

The 2013 Cisco Global IT Impact Survey Methodology:
Timing and Sample Qualifications

The 2013 Cisco Global IT Impact Survey

- Provides insight into IT's role as a business enabler
- Assesses the extent network investments keep pace with business demands
- Looks at IT's likelihood to adopt new technologies that can increase IT's effectiveness



The survey was commissioned by Cisco and distributed by Insight Express with the goal of helping business leaders and IT organizations to better understand the challenges related to enabling new innovative smart business processes.

Perception: IT–Business Alignment Is Better than Before

ENGAGEMENT

89% of IT leaders collaborate with their business leaders more than once a month

CONFIDENCE

63% are confident IT can respond to business needs

IT and business leaders are working more closely together than ever before.

Reality: IT–Business Alignment Needs Further Improvement

WORK AROUND IT

76%

of IT said business leaders and other non-IT teams roll out new applications without engaging IT either “all the time” or “sometimes.”

LATE ENGAGEMENT

38%

of IT professionals are brought into the planning and deployment process late

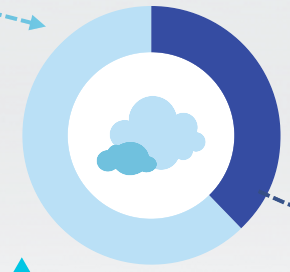
Engagement does not equate alignment of business and IT planning.

IT View into Application Trends

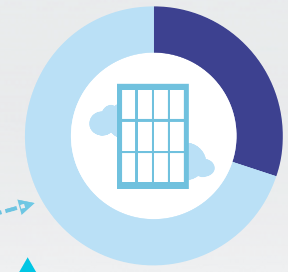
71% say IT is deploying more **applications** today compared to a year ago, **yet…**

IT says the network is not ready for ….

41%
BYOD



38%
Moving applications to the cloud



30%
Data center consolidation and virtualization

Network Relevance to Applications

78% see the **network as more critical** for delivering business applications compared to a year ago, **yet…**

82% said that user experience with standard business applications, as well as Web, files services and email, **is impacted by network performance**

Top IT Challenges

The following IT Initiatives have been more difficult to rollout compared to typical IT projects (over the past 12 months)

- 40% Moving Your Applications to the Cloud
- 38% Centralizing/Virtualizing the Data Center
- 33% Virtual Desktop Infrastructure
- 30% Supporting BYOD
- 28% Deploying SaaS Applications

“ ”

“It’s quite a balancing act to **keep innovating** while meeting our day-to-day requirements.*

“The speed of business has been accelerating for a long time. But now it seems like **everybody is just holding on** with white knuckles.*

* Focus-group feedback.

Roadblocks for Success

The following has slowed down new application rollouts in the past 12 months

Not enough budget

34%

18%

would rather break out of prison or train for a triathlon than ask for additional budget

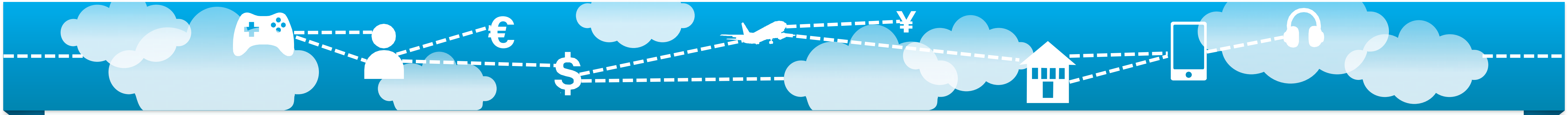
26%
Network limitations

26%
Cloud Infrastructure readiness

26%
D.C. Infrastructure readiness

25%
Not enough staff

The Internet of Things



48%

see new business opportunities in **The Internet of Things**

42%

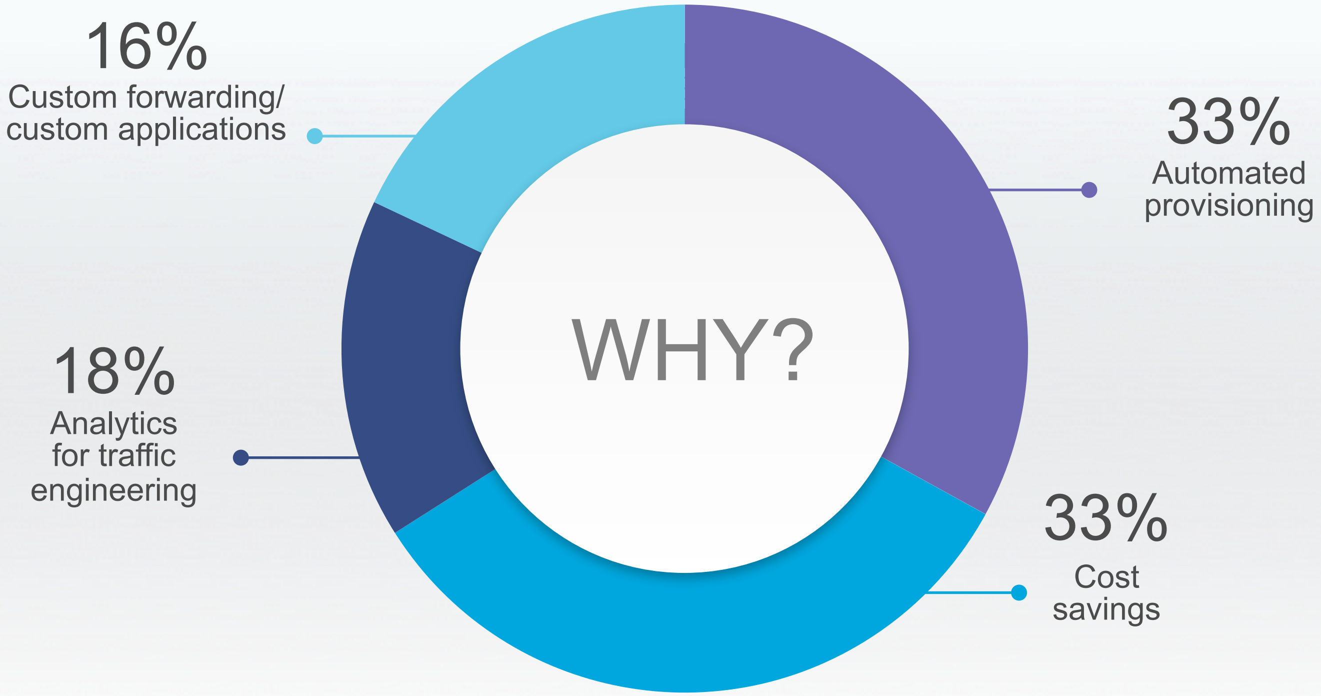
are as familiar with **The Internet of Things** as they are with Einstein's theory of relativity (somewhat familiar)

$$e=mc^2$$

The Promise of SDN

71%

plan to deploy SDN solutions this year

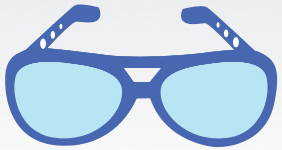


Perspectives on SDN

34%

say they've seen an actual SDN deployment as often as they've seen:

Elvis



Bigfoot

Loch Ness Monster

IT's Ability to Execute on Business Priorities

35%

are somewhat confident in their IT department's ability to respond to the needs of the business…

…equal to their perceived ability to do **"Gangnam Style"** dance moves

How Does IT Know That They Are Doing a Good Job?

Nobody calls us

26%

I sleep at home instead of the office

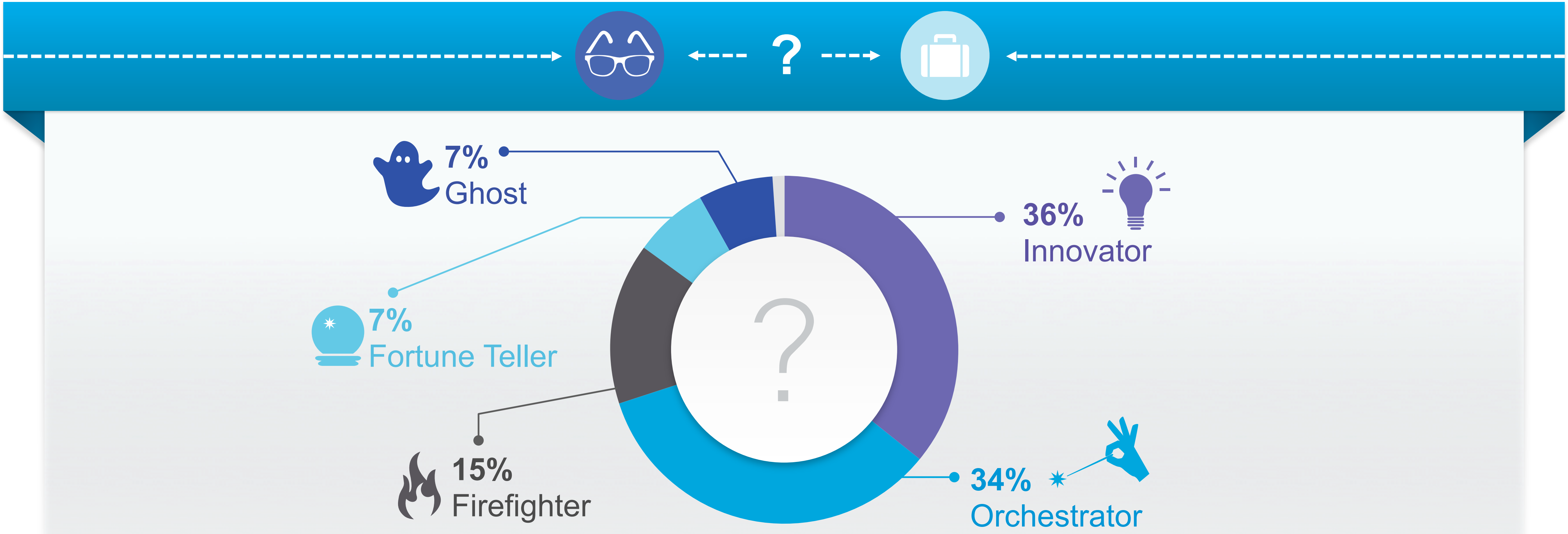
23%

"Everybody has to wear 20 hats. Used to be five hats; now it's 20 hats.

Do more with less.*

* Focus-group feedback.

How Do Your Business Leaders View IT?



Two-thirds of IT feel Respected by the Business,
One Third has Way to Go

Summary

Accelerate IT Business Impact

Greater Strategy and Execution Alignment Needed to Drive Success

Network Transformation Needed to Drive Application and Business Transformation

Plans for growth and innovation tied to network readiness and adoption of new technology opportunities

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2013 Cisco Global IT Impact Survey

Detailed Survey Results

To learn more, go to
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Respondent Profile

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Global IT Team Size

ITDMs in France and Australia are significantly more likely to have less than 10 people on their IT team globally, compared to those in Canada, India and China.

ITDMs in India are most likely to work for companies with large IT teams globally, with 1 in 5 indicating they have 1,000 – 9,999 people on their team.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
1 - 4	5	2	6 K	5	5	7 K	6 K	7 K	3	9 K	4	0	7 K	7 K
5 - 9	8	9	2	9	10 BJ	9	16 BJK	10 BJ	10 BJ	7	2	6	8	14 BJ
NET (1-10)	**13**	**11**	**8**	**14**	**15**	**16 JK**	**22 BJK**	**17 JK**	**13**	**16 JK**	**6**	**6**	**15**	**21 BJK**
10 - 19	11	9	12	11	13	9	19 IJK	16 K	17 IK	7	7	6	15	9
20 - 49	16	12	7	26 ABIJK	20 BJ	21 BJ	15	17	17 B	13	7	14	17 B	17
50 - 99	15	13	24 CFGJ	11	17	23 CFGJ	9	9	13	14	11	20 FG	15	17
100 - 249	13	13	18 DM	11	7	14	16 M	16 M	11	9	19 DM	15	14	6
250 - 499	9	12	7	9	8	7	6	7	11	10	10	10	10	8
500 - 749	6	10 L	4	3	5	4	4	5	5	7	9	8	2	10 L
750 - 999	4	11 EFHLM	4	5	6	2	2	5	2	6	4	4	2	2
1,000 - 9,999	9	7	12 E	8	8	2	7	6	8	15 E	20 ACDEFGHKM	9	10 E	8
10,000 or more	4	2	5	2	2	2	2	3	5	6	7	8	3	2

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q42. Approximately, how many people are on your IT team globally? (Select one)

Access to Network

Roughly one quarter of ITDMs indicate less than 250 users have access to their company's network within their country.

About 3 in 10 indicate having 250-999 domestic users who have access to their company's network, including nearly half of ITDMs in Germany.

ITDMs in China have the most users accessing their company's network, with nearly half indicating 10,000 or more users have access to their company's network.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Less than 100	13	12 K	8	18 JK	18 JK	13 K	12 K	11 K	13 K	18 JK	6	2	15 K	21 BJK
100 - 249	13	11 K	11 K	14 K	17 K	15 K	22 IK	17 K	17 K	9	11 K	2	16 K	12 K
(NET) Less than 250	**26**	**23 K**	**19 K**	**32 JK**	**35 BJK**	**28 K**	**34 BJK**	**28 K**	**30 JK**	**27 K**	**17 K**	**4**	**31 JK**	**33 BJK**
250 - 499	13	10	13 K	14 K	13 K	15 K	17 K	24 AHKLM	12	13 K	15 K	4	11	12
500 - 749	9	19 FJKLM	10	10	15 JK	10	8	9	10	9	4	5	8	8
750 - 999	9	10	12	7	11	11	9	13 K	6	9	6	4	6	10
(NET) 250-999	**31**	**39 KL**	**35 K**	**31 K**	**39 KL**	**36 K**	**34 K**	**46 CHIJKLM**	**28 K**	**31 K**	**25 K**	**13**	**25 K**	**30 K**
1,000 - 4,999	16	15	12	10	12	19	13	14	18	23 C	22 C	18	24 BCDM	12
5,000 - 9,999	9	6	13 GH	10	8	7	9	3	4	8	11	16 AGH	7	12 G
10,000 or more	14	12	18 DGM	13 D	4	8	8	7	13 D	10	21 DEFGM	49 ABCDEFGHIJLM	13 D	7
Don't know	4	5	4	4	3	2	4	3	8	2	4	2	2	6

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q43. Approximately, how many users have access to your company's network in [country]? (Select one)

Number of Users

About 1 in 5 ITDMs indicate they have less than 250 users on their company's network worldwide, among those, one quarter ndicate having less than 100 global users.

Those in China are most likely to have the most amount of users on their network worldwide.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Less than 100	11	13 K	6	8	15 K	12 K	12 K	10 K	8	24 BCEFGHJK	7	2	15 K	17 BK
100 - 249	10	8	5	15 BK	10 K	10 K	14 K	14 K	13 K	10 K	6	2	14 K	6
(NET) Less than 250	**21**	**21 K**	**11**	**23 BK**	**25 BJK**	**22 K**	**26 BJK**	**24 BK**	**21 K**	**34 BJK**	**13 K**	**4**	**29 BJK**	**23 BK**
250 - 499	11	9	10	7	11	14 K	15 K	18 CK	15 K	9	11	4	12	13 K
500 - 749	11	14	9	12	13	11	12	16 KL	14	9	12	6	5	14
750 - 999	9	14	9	9	13	10	7	12	6	6	5	6	8	8
(NET) 250-999	**31**	**37 K**	**28**	**28**	**37 K**	**35 K**	**34 K**	**46 BCIJKL**	**35 K**	**24**	**28**	**16**	**25**	**35 K**
1,000 - 4,999	16	14	20	15	14	14	12	17	11	18	20	14	22	11
5,000 - 9,999	10	9	13 G	5	9	9	10	3	12 G	7	10	19 CGIL	7	13 G
10,000 or more	18	15	23 DG	20 G	11	15	14	8	17	13	24 DG	45 ABCDEFG HIJLM	14	13
Don't know	5	4	6	9	5	5	6	3	7	5	5	4	5	5

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q44. And approximately, how many users are on your company's network worldwide? (Select one)

2012 Company Revenue

While 3 in 10 ITDMs in Russia indicate their company's revenue for 2012 was less than $25 million, a similar proportion in Brazil and France indicate a revenue of $25 million to just under $100 million.

In India, one quarter of ITDMs report a company revenue of $1 billion or more, followed by those in China and Canada.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Less than $25 million	18	25 CKL	16 K	12	27 CKL	19 K	16 K	16 K	17 K	31 BCFGHJKL	17 K	4	12	20 K
$25 million to just under $100 million	20	17	16	24 H	30 ABHIJK	22	29 BHIJK	21	12	15	15	16	23	19
$100 million to just under $500 million	20	24 D	18	22	11	16	15	27 D	18	15	22	27 D	21	19
$500 million to just under $1 billion	13	14 I	13 I	8	13 I	16 I	10	15 I	9	4	14 I	26 BCDFHIM	20 CHIM	7
$1 billion to just under $5 billion	9	7	12	6	7	5	10	7	5	6	19 ACDEGHI	15 EH	11	14
$5 billion or more	6	5	9 I	6	3	10 GI	9 I	2	5	1	7	7	8 I	4
Net (One billion or more)	**15**	**12**	**21 GHI**	**12**	**10**	**15**	**19 I**	**9**	**10**	**7**	**26 ACDGHI**	**22 DGHI**	**19 I**	**18 I**
Don't know	15	8	17 JKL	22 ADJKL	10	12	12	13	35 ABDEFGJKLM	29 ADEFGJKL	6	5	5	17 JKL

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q45. Which of these categories captures your company's revenue for 2012? (Select one)

IT Department

The majority of ITDMs, close to two thirds, are members of a corporate IT department – particularly those in France and Germany.

Significantly more than those in all other countries, more than half of ITDMs in Japan and Mexico indicate being members of a line of business IT department.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Corporate IT	64	67 CL	66 CL	46	67 CL	65 CL	87 ABCDEHIJ KLM	77 CHLM	62 CL	65 CL	67 CL	65 CL	35	57 L
Line of Business IT	34	26 F	31 F	51 ABDEFGIJ KM	31 F	32 F	13	23	37 FG	33 F	28 F	35 F	65 ABDEFGHI JKM	36 F
Other	2	7 FGKL	3	3	2	3	0	0	1	2	5	0	0	7 FGKL

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q7. As an IT professional, which of the following best describes your department?

Age

The largest proportion of ITDMs, 4 in 10, are between the ages of 30 and 39 – although, in China the proportion of ITDMs in this age group increases to 61%.

Driven by more than half of ITDMs in India, roughly 1 in 5 from the total sample are between 22 and 29 years of age.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
22-29	21	14	15	26 EFHLM	35 ABEFHKLM	11	10	29 ABEFHLM	12	35 ABEFHKLM	55 ABCDEFGHIKLM	18	10	9
30-39	41	46 L	39 L	44 L	44 L	35	37	33	37	49 GL	37	61 ABCDEFGHJL	25	49 GL
40-49	26	22 J	34 DIJKM	25 J	16 J	34 DIJKM	36 ADIJKM	26 J	39 ACDIJKM	14	6	19 J	42 ACDGIJKM	20 J
50-59	10	12 IJK	11 JK	5	5	17 CDIJK	14 IJK	11 JK	12 IJK	3	2	3	21 CDIJK	18 CDIJK
60 or older	2	6 CIJK	2	0	1	3	3	2	1	0	0	0	2	4

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q8. Which of the following best describes your age?

Industry

Led by those in Canada, the US, Brazil and India, 1 in 5 ITDMs indicate working in the IT consulting industry.

Relative to others, considerably larger proportions of ITDMs in Russia and India work in the internet, computer or communications software industry.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
IT Consulting (i.e. recommending IT and/or telecommunication solutions to customers)	20	28 EFHK	30 CEFHK	17	27 FHK	15	13	24 K	13	23 K	27 FHK	10	21 K	19
Manufacturing	12	7	7	10 D	1	14 D	13 D	18 ABDHI	6	6	13 D	27 ABCDEFHIJM	23 ABCDHIM	9 D
Education	7	8 FL	6 F	5	13 FGL	12 FGL	0	3	7 F	6 F	8 FL	8 FL	1	9 FL
Finance, Banking, Accounting	7	5	9	6	6	6	10	4	7	5	6	7	5	11
Business Consulting	6	5	10 K	9 K	9 K	8 K	4	3	8 K	4	4	1	3	9 K
Internet, Computer, or Communications Software	6	5	4	4	2	3	12 DEGK	1	8 G	15 ABCDEGKLM	14 BCDEGKL	3	4	5
Construction	5	6	1	7	2	5	5	5	9 B	9 B	3	5	3	3
Software Development	5	4	2	2	6 I	2	3	4	7 I	0	15 ABCEFGIK	2	11 BCEIK	7 I
Government (Public Admin)	4	0	4	7 A	5	5	5	4	6 A	6 A	1	6 A	1	6 A
Health/Medical/ Pharmaceutical	4	2	6	8 J	3	5	4	9 J	2	3	1	4	3	4

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q9. Which industry are you in? (Select one)

Industry (Continued)

In China, 1 in 10 ITDMs indicating working in the transportation industry; significantly larger than those in most other countries.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Retailer (Non-Computer)	3	4	4	3	4	5	2	2	3	3	0	1	6 J	2
Transportation	3	1	6 J	1	2	3	5	1	2	2	0	10 ACDGHIJL M	1	2
Insurance/Real Estate/Legal	2	2	2	2	1	2	3	3	2	1	0	4	1	2
Internet, Computer, or Communications Hardware	2	4	0	2	7 BK	2	2	1	4	2	4	0	1	1
Utilities	2	1	1	4	0	4	3	1	7 DJL	2	0	4	0	4
Entertainment	1	2	0	1	1	0	2	1	1	1	0	0	3	0
Government (Military)	1	1	0	0	2	1	1	0	2	1	0	0	0	1
Hospitality	1	2	2	1	1	1	3	1	0	1	0	1	0	2
Shipping/Handling/ Importing & Exporting/ Trucking	1	0	1	1	0	1	2	3	0	2	0	3	1	0
Travel	0	1	0	0	0	0	1	0	0	0	0	0	0	2
Other General Industry	3	4	2	5	4	1	2	3	3	3	2	1	4	1
Other Service Businesses	3	3	3	4	3	0	3	5	3	5	1	1	6 EM	0
Other	3	5	1	1	2	5	4	5	3	2	1	4	3	1

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q9. Which industry are you in? (Select one)

Job Title

Nearly one quarter of ITDMs are currently employed as IT administrators or consultants, including 4 in 10 from Germany.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
CIO, CSO, CISO	8	5	4	1	12 CJL	13 BCJL	7	6	9 C	15 ABCJL	3	13 BCJL	3	8 C
CEO, CFO, CTO, COO, or other non-IT C-level executive	6	7	6	4	5	6	7	3	9	4	4	6	4	8
VP of IT	3	6 H	5	1	2	2	1	6 H	0	2	4	3	9 CFH	2
Director of IT	17	23 CDHIJM	17 C	6	10	16 C	26 CDHIJM	19 CJ	9	10	7	45 ABCDEFGHIJLM	22 CDHIJ	11
Network Manager/ IT Manager	18	12	17	18	15	26 AGK	21 K	11	25 AGK	19	26 AGK	9	16	24 AGK
IT Administrator or IT Consultant	22	17	30 AFKL	26 FKL	28 FKL	22 L	13	40 AEFHIKL	18	18	28 FKL	14	10	27 FKL
Network Architect	2	0	1	2	1	2	1	3	2	1	1	1	0	5
Application, Server, or Storage Manager	4	3	2	2	5	1	7	2	4	7	6	2	11 BCEGKM	1
Security Manager	2	5	2	4	0	2	2	5	0	1	3	1	3	1
Data Center Manager	3	5	2	3	3	2	4	0	3	6 G	1	5	3	1
Voice or Video Manager	1	0	1	0	0	0	2	0	1	1	1	0	1	0
IT Operations/Helpdesk	10	10 K	9	28 ABEFGIJKLM	18 EFGKM	5	3	4	17 EFGKM	15 EFGKM	8	2	15 EFGKM	4
Other	4	7 K	5	5	2	3	7 K	2	4	2	8 K	0	5	8 K

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q10. Which of the following best describes your job title?

Role Within IT

More than one third of ITDMs indicate application development / services is their role within their department.

Compared to those in some other countries, a significantly larger proportion of ITDMs in Russia, Spain, France and Brazil indicate NOC or IT monitoring as their role within IT.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Application Development/Services	36	35	44 CG	27	41 G	35	41 G	22	35	30	43 CG	38 G	39 G	36 G
Network Design/Planning	16	16 D	22 DF	15	6	22 DF	8	21 DF	20 DF	14	16 D	14	21 DF	19 DF
Data Center Architect	11	13 DH	16 DFH	7	3	12 DH	6	13 DH	3	7	11	22 CDFHI	18 CDFHI	14 DH
NOC or IT Monitoring	11	7	6	10	17 BEJKLM	5	19 ABEJKLM	11	19 ABEJKLM	25 ABCEGJKLM	5	7	3	5
Telecom	8	2	3	18 ABEFJKL	17 ABEFJKL	3	4	11 AK	15 ABEFK	9	6	2	6	8
Mobile Device Team	7	16 BEHIKLM	3	12 BEIM	9	2	10 EI	12 BEIM	5	2	7	4	4	3
Security Architect/Engineer	5	6	3	4	1	6	4	3	3	9 D	6	12 BDGH	6	4
Other	6	5	4	7 H	7 H	15 ABHIKL	9 HK	8 HK	0	5	6 H	1	3	11 HK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q11. Which of the following describes your role within IT:

IT Decision-Making

When it comes to making IT product/solution decisions for their company's network, more than three quarters of ITDMs are either the primary decision maker or always influence such decisions.

In China, more than 3 in 4 indicate they are the primary decision maker – considerably larger than ITDMs in all other countries.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
I am the primary decision maker	45	55 BCHI	39 I	40 I	41 I	55 BCHI	45 I	46 I	33	24	45 I	77 ABCDEFG HIJLM	42 I	42 I
I always influence such decisions, but I am not the primary decision maker	32	22	35 K	31 K	41 AK	27 K	27 K	34 K	35 K	52 ABCEFGHK LM	38 AK	12	31 K	37 AK
I often influence such decisions, but I am not the primary decision maker	12	13 K	16 K	20 EJKM	10	7	15 K	14 K	15 K	17 K	8	4	16 K	9
I sometimes influence such decisions, but I am not the primary decision maker	10	10	11	9	9	11	13	7	17 GIK	6	9	7	12	12
I never influence such decisions	0	0	0	0	0	0	0	0	0	0	0	0	0	0

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q12. Which of the following best describes your role in making IT product /solution decisions for your company's network? (Select one)

Worldwide Employee Size

Roughly 1 in 5 ITDMs from Mexico indicate having 10-49 employees at all locations, worldwide, significantly larger than those in Canada, the UK, Russia, China and Japan.

In India and China, about 3 in 10 ITDMs report having 1,000-9,999 employees worldwide.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
10 - 19	4	6	2	7	6	5	5	5	5	2	4	1	2	5
20 - 49	7	8	5	14 EKL	6	3	6	7	7	7	8	5	3	9
NET (10-49)	**11**	**14**	**7**	**21 BEIKL**	**12**	**8**	**11**	**12**	**12**	**9**	**12**	**6**	**5**	**14**
50 - 99	11	11	7	9	14	7	9	14	14	17 BK	8	6	11	13
100 - 249	14	15	15	16	12	22 IJ	17	11	18	9	8	13	19 J	12
250 - 499	14	20 CFJ	11	9	12	13	9	22 CFJ	21 CFJ	13	8	11	18	19 J
500 - 749	9	6	8	12	9	8	9	9	8	13	9	12	8	6
750 - 999	8	5	11 H	4	11 H	5	8	14 CH	2	10 H	10 H	10 H	5	8
1,000 - 9,999	22	15	25 G	19	25 G	23	22	13	14	21	32 AGHM	30 AGH	24	18
10,000 or more	12	14	17 DG	10	6	14	17 DG	6	12	10	13	12	10	10

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q13. Approximately how many people does your company employ at all locations, worldwide? (Select one)

Survey Details

To learn more, go to
www.cisco.com/go/impactsurvey

IT Visibility

The largest proportion of ITDMs, slightly more than one third, indicate their business leaders would describe their IT department as an *innovator* or an *orchestrator*.

No less than half of ITDMs in Mexico, Japan, Germany and Spain indicate business leaders would describe them as *orchestrators*.

Relative to other countries, ITDMs in Russia are significantly more likely to anticipate being described as *fire fighters* by business leaders.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
An innovator	36	43 GHIL	41 GIL	36 GIL	55 CFGHILM	44 GHIL	36 GIL	14	28 GL	20	48 GHILM	60 ABCEFGHILM	14	33 GL
An orchestrator	34	17	22	57 ABDEFIJKM	21	24 J	38 ABDEJK	54 ABDEFIJKM	50 ABDEJKM	36 ABDJ	11	24 J	58 ABDEFIJKM	26 J
A fire fighter	15	20 CHK	19 CHK	4	10	19 CHK	14 C	13 C	8	25 CDGHK	19 CHK	8	21 CHK	21 CHK
A fortune teller	7	9	10 FK	3	8	7	2	6	6	13 CFKL	15 CFKL	2	4	14 CFKL
A ghost	7	11 C	9 C	0	6 C	6 C	10 C	13 CL	8 C	6 C	7 C	6 C	3	6 C

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q40. When you think of IT's visibility in the organization, how would your business leader describe you? (Select one)

Frequency Of Collaboration

Most ITDMs indicate their IT leaders collaborate with line of business leaders (e.g., sales, marketing, human resources, legal, etc.) on new projects at least once a month or more often, including nearly half who indicate the collaboration occurs at least once a week.

Collaborations between IT leaders and line of business leaders on new IT projects are significantly more frequent in China and slightly less frequent in Japan.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
At least once a week	47	55 EHM	44	46	52 EHM	34	44	49 E	37	52 EHM	42	71 ABCDEFG HIJLM	47	35
At least once a month	42	37	49 K	45 K	39 K	49 K	45 K	40 K	47 K	41 K	49 K	25	36	50 K
At least once a year	7	4	6	9	3	9	4	8	10	4	6	3	14 ADFIK	7
As often as I win the lottery, get abducted by aliens, or travel back in time (In other words, IT does not collaborate with the business leaders)	2	2	0	0	4	3	1	4	3	2	2	0	2	4
I don't know	2	2	2	0	2	5	6 CG	0	4	1	1	1	2	4

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q14. How frequently do your IT leaders collaborate with your line of business leaders (e.g. Sales, Marketing, Human Resources, Legal, etc.) on new IT projects?

Meeting With Business Leaders

More than 6 in 10 ITDMs indicate the Director of IT meets with business leaders, particularly among those in China, Japan, Canada and France.

No less than 4 in 10 ITDMs in Canada, China and the US indicate the VP of IT meets with business leaders.

In Russia, the largest proportion, about half, indicate the CIO meets with their business leaders, while a similar proportion in France and Japan indicate Other IT Employees meet with business leaders.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
CIO	34	29	27	44 ABDJL	20	35 DL	34 DL	46 ABDJLM	43 BDJL	53 ABDEFJLM	23	45 ABDJLM	17	30 L
VP of IT	33	44 HIM	47 CDEFGHIM	31	32	32	30	30	21	20	36 HI	42 HIM	36 HI	27
Director of IT	62	61	71 GHIM	61	67 GI	59	70 GHIM	50	53	50	63	78 ACEGHIJM	72 GHIM	53
Other IT Employees	37	33	37 K	35 K	40 K	42 HK	50 ACHJK	39 K	27	36 K	31	21	47 HJK	41 K
Nobody does	2	2	1	0	1	4	4	0	2	4	2	0	3	3
I don't know	2	3	2	0	3	2	2	0	0	0	3	1	3	3

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q15. Who in your organization meets with your business leaders? (Check all that apply)

IT Visibility

Driven by those in Mexico, India and Russia, nearly three quarters of ITDMs indicate IT's visibility is 'crystal clear' when it comes to the initiatives of future business plans.

IT's visibility in regards to the initiatives of their organization's business plans is considerably less clear in Japan, France and the UK, with more than one third indicating IT's visibility is 'like a foggy day in London.'

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Crystal Clear	73	74 L	69 L	90 ABDEFGKLM	75 L	62	63	78 EFL	79 EFL	82 BEFL	85 BEFKLM	71 L	53	71 L
Like a Foggy Day in London	25	22 C	30 CIJ	10	23 C	37 ACDGHIJ	36 ACGHIJ	20	20	15	13	28 CIJ	45 ABCDGHIJKM	27 CJ
Blind as a Bat	2	4	1	0	2	1	1	2	1	4	2	1	2	2

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q16. Describe IT's visibility into the initiatives your business is planning:

Confidence In IT

Most ITDMs feel very confident in their IT's ability to respond to the needs of their business – especially in China, India and the US.

Confidence level in IT's ability to respond to business needs are considerably low in France and Japan.

Further, significantly larger than those in most other countries, half of ITDMs in Japan are somewhat confident in IT's ability to respond to the needs of their business.

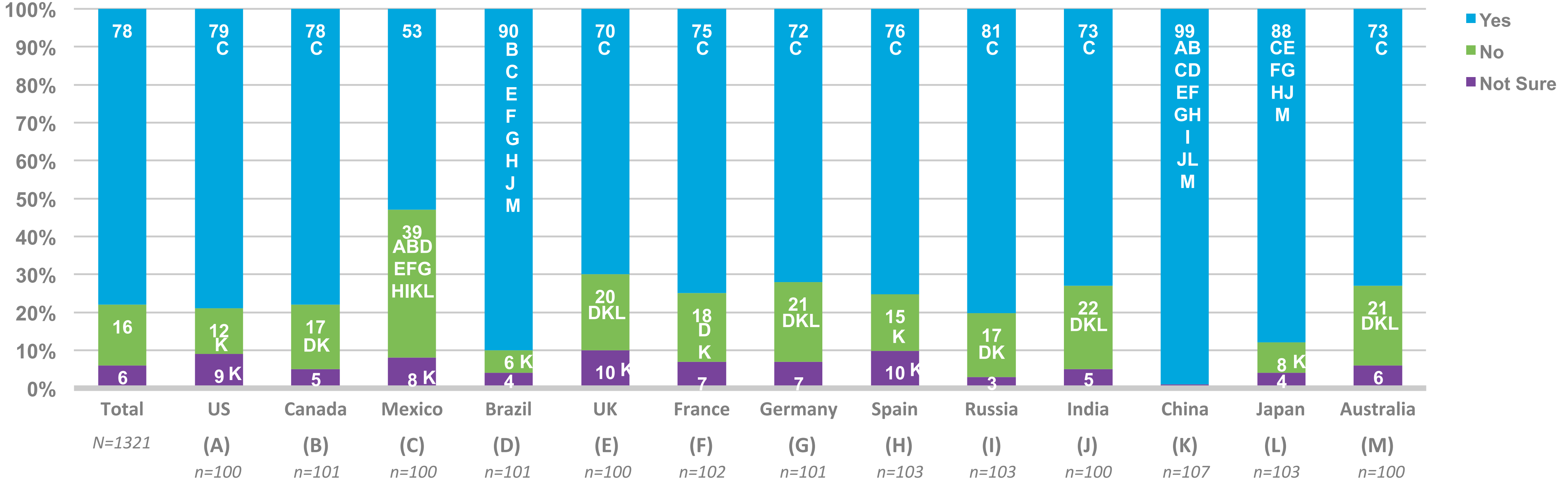
Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
As confident as I am in the sun coming up (Very confident)	63	75 BEFLM	54	67 L	65 L	53	53	64 L	62 L	68 EFL	72 BEFL	79 BDEFGHLM	45	59
As confident as I am in knowing how do to the "Gangnam Style" (Somewhat confident)	35	22	44 AJK	33	33	45 AJK	38 AK	35 K	38 AK	32	28	21	50 ACDGIJK	38 AK
As confident as my ability to travel to the moon (Not confident)	2	3	2	0	2	2	9 CGHIJK	1	0	0	0	0	6 CHIJK	3

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q17. How confident you are in IT's ability to respond to the needs of your business?

Delivering Business Applications

Mainly led by the vast majority in China, Brazil and Japan, nearly 8 in 10 ITDMs from the total sample indicate the network is more critical for delivering their business applications than it was a year ago.

In contrast, roughly 4 in 10 ITDMs from Mexico indicate the network is not more critical for delivering their business applications, relative to a year ago; this proportion is nearly twice that of ITDMs in all other countries.



A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q18. Is the network more critical for delivering your business applications than it was a year ago?

Delays In New Application Rollout

Overall, ITDMs cite a variety of reasons for slowing down their rollout process, with the largest proportion identifying low budgeting as the main cause of delays for new application rollouts within the last year – this is particularly a problem in Russia, Japan and France.

Data center and cloud infrastructure readiness are predominantly responsible for delays in China, while storage readiness emerges as the cause for slowdowns among 3 in 10 ITDMs in US, Canada, China and Australia.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Not enough budget to complete project	34	26	32	36	26	31	42 ADGJK	25	39 GJK	53 ABCDEGJKM	24	24	44 ADGJK	36
Data Center infrastructure readiness	26	23	27	30	22	25	20	25	25	27	32	43 ABDEFGHILM	25	19
Cloud Infrastructure readiness	26	20	34 AI	24	24	30 I	21	21	22	17	33 I	39 ACDFGHIL	23	27
Network limitations e.g. bandwidth, latency	26	28	26	24	26	24	25	20	23	27	29	34 G	23	29
Not enough staff - too busy keeping the lights on	25	17	29 C	13	25 C	25 C	26 C	23	17	39 ACDEGHJK	21	23	44 ABCDEFGHJKM	28 C
General procrastination	25	26 FH	25 FH	19 F	17 F	22 F	6	34 CDFH	12	49 ABCDEFGHJLM	28 FH	36 CDEFH	27 FH	26 FH
Computer readiness	23	29	26	28	19	21	23	18	27	19	26	19	17	23
Storage readiness	23	32 CHIL	31 CHIL	14	20	20	26 I	21	17	13	28 CI	31 CHIL	16	33 CHIL
None of these	9	11	10	7	7	15 IK	11	12 I	9	3	8	4	8	16 IK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q19. Which of the following has slowed down a new application rollout within the last year? (Check all that apply)

Impact Of Applications

ITDMs place emphasis on the impact of each of the listed applications and network initiatives on network performance and user experience. In China, Brazil, Mexico, India and the US, more than two thirds of ITDMs indicate social media has an impact on network performance and user experience.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Web	85	89 F	91 FG	92 EFGLM	92 EFGLM	81	77	79	86	82	91 FG	88	81	81
File Services	83	84	85	80	85	75	75	79	87 EF	84	83	91 CEFG	87 EF	87 EF
Business Applications e.g. ERP, Financial Reporting	82	78	82	81	89 G	82	78	77	84	79	86	93 ABCEFGILM	78	78
Data Center Consolidation	81	78	83	81	84	75	77	73	82	82	88 EGM	95 ABCDEFGHILM	82	75
Email	80	85 G	79	84 G	85 G	81	75	71	83	83	85 G	86 GL	73	77
Operations Applications e.g. SCADA, Physical Security	79	78	81	86 F	78	76	70	75	77	74	80	95 ABCDEFGHIJLM	86 FI	74
Enterprise Collaboration e.g. Instant Messaging, Video Conferencing	78	74	79	83 EGL	85 EGL	68	77	68	86 EGL	80	77	93 ABCEFGIJLM	68	74
Virtual Desktop (VDI)	75	73	74	83 EFGM	80	67	69	69	73	72	83 EFGM	86 ABEFGHILM	74	67
Cloud Services Migration	75	73	78	79 EG	82 EFGM	65	68	65	82 EFGM	71	81 EGM	92 ABCEFGIJLM	75	67
Bring Your Own Device (BYOD)	65	74 EFM	64	74 EFM	60	50	56	63	66 E	67 E	68 E	85 BDEFGHIJLM	65 E	56
Social Media e.g. Facebook, Twitter	61	70 BEGILM	53	71 BEGILM	73 BEFGILM	52	58	53	64 I	46	69 BEGILM	83 ABEFGHIJLM	50	52

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q20. For the following applications and network initiatives, please rate the impact each has on network performance and user experience? (Select one for each row)

Note: Charted Net of ‘High Impact’ / ‘Some Impact’

Percentage Breakdown of Applications
(Were Cloud-Based One Year Ago)

While 1 in 5 indicate none of their applications were cloud-based a year ago, roughly two thirds indicate that between 1%-20% of their applications were cloud-based within the same timeframe.

Compared to those in other countries, ITDMs in the US indicate considerably higher proportions of cloud-based applications one year ago.

In Mexico, 1 in 5 ITDMs indicate that a year ago 21%-50% of their applications were cloud-based, significantly higher than those in Canada, France, Russia, Australia and the UK.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
None	20	13	17 K	15	18 K	26 AK	21 K	24 K	22 K	27 AK	17 K	6	29 ACK	28 ACK
Less than 10%	34	22	37 A	37 A	30	36 A	32	32	35	39 A	35	44 A	35	32
10% - 20%	31	37 I	38 CI	24	32	28	39 CIL	33	27	20	31	39 CIL	25	31
21% - 50%	11	14	8	20 BEFIM	16	8	7	11	12	9	11	10	10	8
More than 50%	3	14 BCEFGHKLM	1	4	5	2	1	1	4	5	6	1	1	1

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q21. Approximately, what percentage of your applications were cloud-based one year ago? Are cloud-based today? And will be cloud-based one year from now?

Percentage Breakdown of Applications
(Are Currently Cloud-Based)

Relative to a year ago, the percentage of cloud-based applications has slightly increased, with 88% indicating they have applications that are currently cloud-based.

Further, 3 in 10 ITDMs indicate 21%-50% of their applications are currently cloud-based, largely driven by those in Canada, China, India and the US.

ITDMs in Brazil, Mexico, India and the US were significantly more likely to indicate having more than 50% of applications that are cloud-based at this time.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
None	12	6	8	7	10	16 AK	16 AK	19 ABCK	9	13 K	11 K	3	22 ABCDHK	19 ABCK
Less than 10%	17	14	15	12	19	20	19	15	22 K	16	19	10	15	21 K
10% - 20%	35	29	33	33	27	35	42 DJ	39 J	34	38 J	23	46 ADJM	41 J	30
21% - 50%	30	41 EFGIL	43 DEFGHILM	33	28	25	22	24	27	26	37 FL	38 FGL	20	28
More than 50%	7	10 BFLM	2	15 BEFGKLM	17 BEFGKLM	4	2	4	8	8	10 BFLM	3	2	2

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q21. Approximately, what percentage of your applications were cloud-based one year ago? Are cloud-based today? And will be cloud-based one year from now?

Percentage Breakdown of Applications
(Will Be Cloud-Based One Year From Now)

ITDMs overall have great expectations of their organization's future cloud-based computing plans, as one quarter anticipate more than 50% of their applications will be cloud-based one year from now.

This is mainly driven by more than 4 in 10 ITDMs from Brazil and Mexico, as well as more than one third of those in China and India.

In Germany, the largest proportion, 3 in 10 anticipate 10%-20% of their applications will be cloud-based within the next year.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
None	9	8 K	5	3	8 K	15 BCK	15 BCK	14 CK	7	11 K	7	1	13 CK	13 CK
Less than 10%	11	10	8	8	11	13	16 K	14 K	13	7	15 K	5	12	11
10% - 20%	21	22 D	26 D	20	10	21	25 D	30 DHJK	17	20	16	17	22 D	24 D
21% - 50%	32	30	33	27	25	31	31	24	36	34	26	42 CDGJ	39 DG	35
More than 50%	27	30 FLM	29 FL	42 EFGHLM	47 ABEFGHILM	20	13	19	27 F	28 FL	36 EFGLM	36 EFGLM	15	17

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q21. Approximately, what percentage of your applications were cloud-based one year ago? Are cloud-based today? And will be cloud-based one year from now?

Percent Breakdown of Personal Device Use
(Brought Personal Mobile Devices One Year Ago)

Though 1 in 5 ITDMs indicate employees did not bring in their personal mobile devices (e.g. BYOD) to work one year ago, 4 in 10 cite that 25% or more employees within their organization brought personal mobile devices to work.

Further, relative to those in most other countries, ITDMs in the US, Russia and India are considerably more likely to indicate that more than 75% of their employees brought in their personal mobile devices to work one year ago.

Those in Japan are significantly more likely to indicate that none of their employees brought in personal mobile devices to work, followed by those in the UK, Germany, Australia and France.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
None	21	12	18	11	22	30 ACJK	25 ACK	29 ACJK	19	18	16	11	38 ABCDHIJK	26 ACK
Less than 25%	40	28	46 A	41	42	43 A	47 A	36	38	40	38	49 AL	34	45 A
25% -50%	24	29 E	28 E	29 E	23	15	21	23	24	22	26	31 E	20	22
51% - 75%	9	18 BFLM	7	15 FM	9	10	5	12	10	9	9	9	7	4
More than 75%	5	13 BCEFGKLM	2	4	5	2	2	1	9 GKL	11 BEFGKL	11 BEFGKL	0	1	3

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q22. Approximately, what percentage of your employees brought their personal mobile devices (e.g. BYOD) to work one year ago? Today? And one year from now?

Percent Breakdown of Personal Device Use
(Currently Bring Personal Mobile Devices)

Compared to one year ago, ITDMs indicate slightly more employees are currently bringing personal mobile devices to work, including one third of ITDMs who indicate 25%-50% of employees are currently bringing mobile devices.

Significantly more ITDMs in the US and Mexico indicate 51%-75% of their employees currently bring personal mobile devices into work, while considerably more ITDMs in Russia and India cite more than 75% of employees do the same.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
None	13	5	14 CK	4	8	19 ACDJK	20 ACDIJK	19 ACDJK	10 K	9	6	2	34 ABCDEFG HIJKM	18 ACJK
Less than 25%	28	24	28 C	15	25	27	36 CJ	33 C	33 C	29 C	21	26	30 C	31 C
25% -50%	34	30	33	35	40 L	33	30	37 L	30	27	34	53 ABCEFGHI JLM	22	37 L
51% - 75%	19	30 EFGHKLM	22 G	38 BDEFGHIJ KLM	23 GM	16	13	8	17	21 G	23 GM	15	13	11
More than 75%	7	11 FL	4	8 FL	5	5	1	4	11 FL	14 BFGKLM	16 BDEFGKL M	4	1	3

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q22. Approximately, what percentage of your employees brought their personal mobile devices (e.g. BYOD) to work one year ago? Today? And one year from now?

Percent Breakdown of Personal Device Use
(Will Bring Personal Mobile Devices One Year From Now)

Usage of personal mobile devices for work is slightly higher within the next year, relative to the current or the last year.

Significantly larger proportions of ITDMs in Mexico, Brazil, India and Russia anticipate more than 75% of employees will bring in their devices to work one year from now (compared to those in most other countries).

While nearly 9 in 10 ITDMs from the total sample anticipate their employees will bring personal mobile devices to work, one third of ITDMs in Japan do not anticipate their employees will bring in any personal mobile devices one year from now – considerably more than those in all other countries.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
None	12	8	13 CIK	4	11 K	17 CIJK	18 CIJK	18 CIJK	9	4	6	3	33 ABCDEFG HIJKM	16 CIJK
Less than 25%	19	15	24 CDJK	8	8	25 CDJK	31 ACDJK	23 CDJK	24 CDJK	27 CDJK	10	11	22 CDJ	23 CDJK
25% -50%	26	30	27	22	20	26	28	39 CDHIJL	21	23	24	31	25	28
51% - 75%	24	25 GL	20 G	30 FGL	32 FGL	24 G	17	9	25 GL	19	33 FGIL	42 ABEFGHIL M	13	23 G
More than 75%	18	22 EFLM	17 FL	36 ABEFGHKL M	30 BEFGKLM	8	6	12	20 EFL	26 EFGKLM	27 EFGKLM	13	7	10

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q22. Approximately, what percentage of your employees brought their personal mobile devices (e.g. BYOD) to work one year ago? Today? And one year from now?

Challenges To Cloud

The largest proportion of ITDMs from the total sample, about half, indicate security data protection or availability/reliability of cloud applications (SLA) are the top infrastructure challenges or roadblocks to successful implementation of cloud services.

These issues were particularly more challenging for ITDMs in China and Japan.

Among ITDMs in France, the US and the UK, the top infrastructure challenges or roadblocks to successful implementation of cloud services was security access control for users and devices.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Security Data Protection	50	39	50	52	45	40	38	56 AEF	53 F	50	50	61 ADEF	59 AEF	50
Availability / Reliability of cloud applications (SLA)	46	38	46 F	45 F	54 AFIJ	40	29	47 F	47 F	38	36	67 ABCEFGHIJ M	57 AEFIJ	47 F
Security Access Control for users and devices	44	41	48	39	38	46	40	47	43	39	45	51	49	46
Application Performance (Response time, latency)	39	38 F	40 F	39 F	46 FH	35 F	21	42 F	30	40 F	39 F	52 EFH	51 EFH	39 F
Network Management	39	30	38	45 AEFI	43 EF	27	26	38	42 EF	29	38	51 AEFI	52 AEFI	41 F
Regulatory and Compliance Policies	38	28	48 ADFI	49 ADFGI	33	39	27	34	42 F	31	43 AF	36	43 AF	43 AF
WAN or LAN Bandwidth	36	26	39 F	38 F	46 AEFH	28	21	32	31	44 AEF	45 AEF	37 F	43 AEF	43 AEF
Visibility and Control of applications	34	33 I	34 I	38 I	34 I	39 I	31 I	27	34 I	16	33 I	46 FGI	38 I	38 I
Availability / Reliability of mobile applications (SLA)	29	30 I	29	30 I	37 FHI	30 I	22	33 I	23	17	26	43 FHIJLM	28	26

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q23. Which of the following are the top infrastructure challenges or roadblocks to successful implementation of cloud services or mobility? (Check all that apply for each row)

Challenges To Mobility

When it comes to successful implementation of mobility, availability / reliability of mobile applications (SLA) or security access control for users and devices are the top infrastructure challenges or roadblocks.

Security data protection emerges as a primary infrastructure challenge for successful implementation of mobility in Japan, Germany, Canada, France and the UK.

Significantly larger than those in other countries, in Japan, regulatory and compliance policies is a challenge for nearly 6 in 10 ITDMs.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Availability / Reliability of mobile applications (SLA)	54	46	50	57 F	58 F	51 F	36	52 F	59 F	48	60 F	62 AF	57 F	62 AF
Security Access Control for users and devices	50	41	46	53 FI	63 ABFI	51 FI	36	51 FI	55 FI	35	50 I	55 FI	56 AFI	50 I
Security Data Protection	49	43	51	44	54 I	51	43	53 I	47	38	47	59 ACFI	64 ACFHIJM	45
Application Performance (Response time, latency)	46	34	51 AF	54 AFI	47	45	35	47	54 AFI	37	49 A	48	48	50 AF
WAN or LAN Bandwidth	44	40	34	51 BFI	51 BFI	41	35	47	42	36	45	52 BFI	51 BFI	49 B
Visibility and Control of applications	44	35	40	51 AFI	52 AFIL	42	30	47 FI	51 AFI	31	56 ABFIL	55 ABFIL	37	45 F
Network Management	43	43 I	39 I	48 FI	41 I	40 I	32	48 FI	48 FI	24	50 FI	48 FI	56 BDEFI	47 FI
Regulatory and Compliance Policies	42	41	42	45	43	40	40	40	37	33	42	45	57 ABEFGHIJ	46
Availability / Reliability of cloud applications (SLA)	38	39	37	47 FIM	47 FIM	35	29	44 FIM	42 M	28	48 FIM	38	35	27

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q23. Which of the following are the top infrastructure challenges or roadblocks to successful implementation of cloud services or mobility? (Check all that apply for each row)

Would Not Be A Challenge

Relative to others, ITDMs in Russia and France were considerably less likely to indicate having to face with any of the listed challenges or roadblocks for successful implementation of cloud services or mobility.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Regulatory and Compliance Policies	32	36 C	31 C	17	30 C	34 C	41 CJM	37 CJ	29	47 BCDH JKLM	23	32 C	31 C	24
Visibility and Control of applications	30	34 CDJK	37 CDHJK	16	20	28 K	42 CDHJK	34 CDJK	23	55 ABCDEGHJKL M	19	13	40 CDHJK	28 K
WAN or LAN Bandwidth	29	40 CDJKM	40 CDJKM	18	15	36 CDJK	49 CDGHIJKLM	29 D	33 CDJ	32 CDJ	18	22	27	23
Network Management	29	30 CK	36 CHJK	17	25	40 CDHJKL	44 CDGHJKLM	26	22	52 ABCDGHJKLM	20	16	23	28
Application Performance (Response time, latency)	26	32 CDK	22	12	17	32 CDK	48 ABCDEGHIJ KLM	27 C	23	33 CDK	22	16	26 C	26 C
Availability / Reliability of mobile applications (SLA)	26	27 DK	31 CDK	17	14	28 DK	45 ACDEGHJKL M	26 K	24 K	43 ACDEG HJKLM	19 K	8	28 DK	22 K
Availability / Reliability of cloud applications (SLA)	24	23 DK	29 CDK	12	7	30 CDK	42 ACDGHJKL	21 DK	18 DK	41 ACDGHJKL	22 DK	7	21 DK	34 CDHK
Security Access Control for users and devices	22	28 CDK	27 CDK	13	12	22	33 CDHJK	20	19	36 CDEGHJK	18	12	23	23
Security Data Protection	20	25 CDK	24 CDK	12	10	25 CDK	29 CDHK	17 K	15	33 CDGHJKL	19 K	6	18 K	24 CDK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q23. Which of the following are the top infrastructure challenges or roadblocks to successful implementation of cloud services or mobility? (Check all that apply for each row)

Familiarity With SDN Solutions

Overall, nearly half of ITDMs indicate they are currently evaluating Software Defined Networking (SDN) solutions, while 1 in 5 are unfamiliar with industry SDN solutions.

Those who are currently evaluating Software Defined Networking (SDN) solutions include more than three quarters of ITDMs in China and more than half of those in Brazil, Mexico and the US.

The largest proportions of ITDMs in Germany, Russia, Japan and Australia indicate not having seen an actual SDN solution.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Yes	47	58 BEFGILM	42	56 EGIM	59 BEFGHILM	35	42	38	44	36	46	77 ABCDEFG HIJLM	42	33
I've seen Bigfoot, Elvis, and/or the Loch Ness Monster as often as I've seen an actual SDN solution (No)	34	25	35 K	32 K	28	35 K	30 K	47 ACDFJK	39 AK	45 ADFJK	28	17	44 ADJK	43 ADJK
I'm as familiar with industry SDN solutions as I am with the landscape of Saturn (I don't know anything about it)	19	17 K	24 CK	12	13	30 ACDGHKL	27 CDK	16	17 K	19 K	26 CDK	7	15	24 CK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q24. Are you currently evaluating Software Defined Networking (SDN) solutions?

Plans To Implement SDN Solutions

Among those who are currently evaluating Software Defined Networking (SDN) solutions, close to 3 in 4 ITDMs, driven by a significantly larger proportion in China, are planning to implement the solutions within the next 12 months.

Relative to those in the US, Mexico and China, a significantly larger proportion of ITDMs in Australia do not know when their organization plans to implement SDN solutions.

Among ITDMs Who are Currently Evaluating SDN Solutions %	Total (n=618)	US (n=58) A	CAN (n=42) B	MEX (n=56) C	BRA (n=60) D	UK (n=35) E	FRA (n=43) F	DEU (n=38) G	SPA (n=45) H	RUS (n=37) I	IND (n=46) J	CHN (n=82) K	JPN (n=43) L	AUS (n=33) M
Within the next 12 months	71	74	69	77 M	77 M	60	58	68	60	70	76	89 ABEFGHIL M	67	52
Within the next 24 months	27	26 K	29 K	23	22	37 K	42 K	29 K	38 K	24	22	11	30 K	36 K
I would learn how to count cards at a casino sooner then I can figure out how we will implement this (I don't know)	2	0	2	0	2	3	0	3	2	5	2	0	2	12 ACK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q25. When are you planning to implement Software Defined Networking (SDN) solutions? (Select one)

Drivers For Investing In SDN Solutions

One third of ITDMs who are currently evaluating Software Defined Networking (SDN) solutions indicate operations cost savings or fast scalability of infrastructure through automation of provisioning is the top driver for investing in SDN solutions.

Fast scalability of infrastructure is considered far more of a top driver for investment in China and, compared to other countries.

Among ITDMs Who are Currently Evaluating SDN Solutions %	Total (n=618)	US (n=58) A	CAN (n=42) B	MEX (n=56) C	BRA (n=60) D	UK (n=35) E	FRA (n=43) F	DEU (n=38) G	SPA (n=45) H	RUS (n=37) I	IND (n=46) J	CHN (n=82) K	JPN (n=43) L	AUS (n=33) M
Operations cost savings	33	36	29	45 K	35	37	28	29	38	27	30	22	47 K	27
Fast scalability of infrastructure through automation of provisioning	33	22	24	29	22	29	33	29	36	38	46 ADL	59 ABCDEFG HLM	16	27
Analytics for traffic engineering	18	28 K	24 K	16	22 K	14	28 K	18	11	22 K	13	5	16	27 K
Custom forwarding and other custom applications	16	14	24	11	20	20	12	24	16	14	11	15	21	15
Other	0	0	0	0	2	0	0	0	0	0	0	0	0	3

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q26. What is the top driver for investment in Software Defined Networking (SDN) solutions? (Select one)

Familiarity With The Internet Of Things

Roughly 9 in 10 ITDMs indicate being at least somewhat familiar with the Internet Of Things, including a significantly larger proportion of those in China, Brazil, Mexico, Spain, India, the US and Germany, who are very familiar.

One quarter of ITDMs in France are not familiar at all with the Internet Of Things – considerably larger than those in most other countries.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
I know it like the back of my hand (Very familiar)	49	60 BEFILM	41 FI	66 BEFILM	69 BEFILM	33 I	25	59 BEFILM	63 BEFILM	18	61 BEFILM	69 BEFILM	30	43 FI
I know it as well as I know Einstein's theory of relativity (Somewhat familiar)	42	29	50 ACDHJK	34	29	57 ACDGHJK	50 ACDHJK	36	35	63 ACDGHJK M	35	29	60 ACDGHJK M	44 ADK
I know it as well as I know how to perform brain surgery (Not familiar at all)	9	11 CDHK	10 CDHK	0	2	10 CDHK	25 ABCDEGHJ KLM	5	2	18 CDGHJK	4	2	10 CDHK	13 CDHJK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q27. How familiar are you with the Internet Of Things? (Select one)

Impact Of The Internet Of Things

Among ITDMs who are familiar with the Internet Of Things, nearly half believe it will open up new opportunities for their business. In fact, roughly 8 in 10 ITDMs in Mexico and China believe the Internet of Things will open up new opportunities for business.

On the other hand, more than one quarter of those in the US and Russia indicate the Internet Of Things means nothing to their business, significantly larger than most other countries.

Among ITDMs Who are Familiar with The Internet of Things %	Total (n=1208)	US (n=89) A	CAN (n=91) B	MEX (n=100) C	BRA (n=99) D	UK (n=90) E	FRA (n=77) F	DEU (n=96) G	SPA (n=101) H	RUS (n=84) I	IND (n=96) J	CHN (n=105) K	JPN (n=93) L	AUS (n=87) M
It will open up new business opportunities	48	40 I	37 I	83 ABDEFGHI JLM	59 ABEILM	29 I	45 EIM	56 ABEILM	58 ABEILM	12	47 EILM	77 ABDEFGHI JLM	31 I	28 I
I'm still learning about it	41	33 C	55 ACDFGHK	15	36 CK	56 ACDFGHK	36 CK	30 C	36 CK	62 ACDFGHJK	43 CK	21	65 ACDFGHJK	56 ACDFGHK
It means nothing	11	27 BCDGHJKL	8	2	5	16 CDHKL	18 CDHKL	14 CKL	6	26 BCDHJKL	10 CK	2	4	16 CDHKL

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q28. What does the Internet of Things mean to your business? (Select one)

Importance Of Network Initiatives

ITDMs place great importance on each of the listed network initiatives when it comes to their business's future – mainly those in China and Mexico.

No less than two thirds indicate converging IT & operations technology as well as data center consolidation / virtualization are most important to their business over the next 12 months.

Software Defined Networking and BYOD are particularly more important to those in Mexico, China, Brazil, India and the US.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Converging IT Technology & Operations Technology	69	76 EFGI	68 F	86 BDEFGHIJLM	73 F	61	52	62	65	61	72 F	86 BDEFGHIJLM	68 F	68 F
Data Center Consolidation/ Virtualizing the data center	66	68	62	81 BDEFGILM	60	57	62	55	68	61	77 BDEFGILM	85 ABDEFGHILM	60	59
Cloud Readiness	63	66 FGM	68 FGM	83 ABDEFGHIJLM	65 FGM	57	46	49	63 F	56	67 FGM	84 ABDEFGHIJLM	59	50
Software Defined Networking	59	72 BEFGILM	50 F	82 BEFGHILM	76 BEFGHILM	46	32	42	58 FG	50 F	72 BEFGILM	82 BEFGHILM	51 F	51 F
Bring-Your-Own-Device BYOD	46	50 EF	37	65 ABEFGHILM	59 BEFGHILM	35	32	42	37	41	52 BEFH	66 ABEFGHILM	39	39

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q29. Using the scale below, where 1 is least important and 5 is most important, please indicate how important the following network initiatives will be to your business over the next 12 months?

Note: Charted Net of 'Most Important 5' / '4' on a 5-point scale

Importance Of Application Rollouts

More than two thirds of ITDMs indicate it is important for their business to rollout storage (e.g., file, data synchronization), email / web services, and development / testing over the next 12 months.

Rolling out enterprise collaboration (e.g., video conferencing, instant messaging) applications within the next year is considerably more important to ITDMs in China, Mexico, Brazil, the US and India.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Storage e.g. File, Data Synchronization	71	65	72 E	85 ABEFGHLM	76 EG	57	65	61	64	77 EGL	82 AEFGHLM	83 AEFGHLM	63	67
Email and Web Services	68	67 F	69 F	83 ABEFGHLM	76 FGLM	64	51	62	69 F	71 F	72 FL	77 FGLM	57	61
Development and Testing	67	73 G	65	82 BEFGHILM	74 G	64	60	54	68	64	71 G	79 BEFGILM	62	61
Financial Reporting	64	72 FGLM	63 FGL	83 BEFGHILM	78 BEFGHLM	58 G	48	43	59 G	66 FGL	73 EFGLM	85 ABEFGHILM	47	54
Enterprise Resource Planning (ERP)	62	58	61	87 ABDEFGHILM	69 FILM	55	49	57	61	54	76 ABEFGHILM	79 ABEFGHILM	47	49
Industry Specific Applications e.g. Point of Sale, CAD/CAM	61	60	52	81 ABDEFGHIJLM	67 BFGM	54	48	50	60	64 F	66 FG	79 ABEFGHIL M	55	52
Enterprise Collaboration e.g. Video Conferencing, Instant Messaging	60	70 BEFGHILM	55	77 BEFGHILM	70 BEFGHILM	53	47	47	55	54	66 FGM	82 BEFGHIJLM	52	48
Operations Applications e.g. SCADA, RTU, Energy Management	57	60 E	55	77 ABEFGHILM	66 EFGIM	44	46	46	57	46	66 EFGIM	78 ABEFGHILM	52	48

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

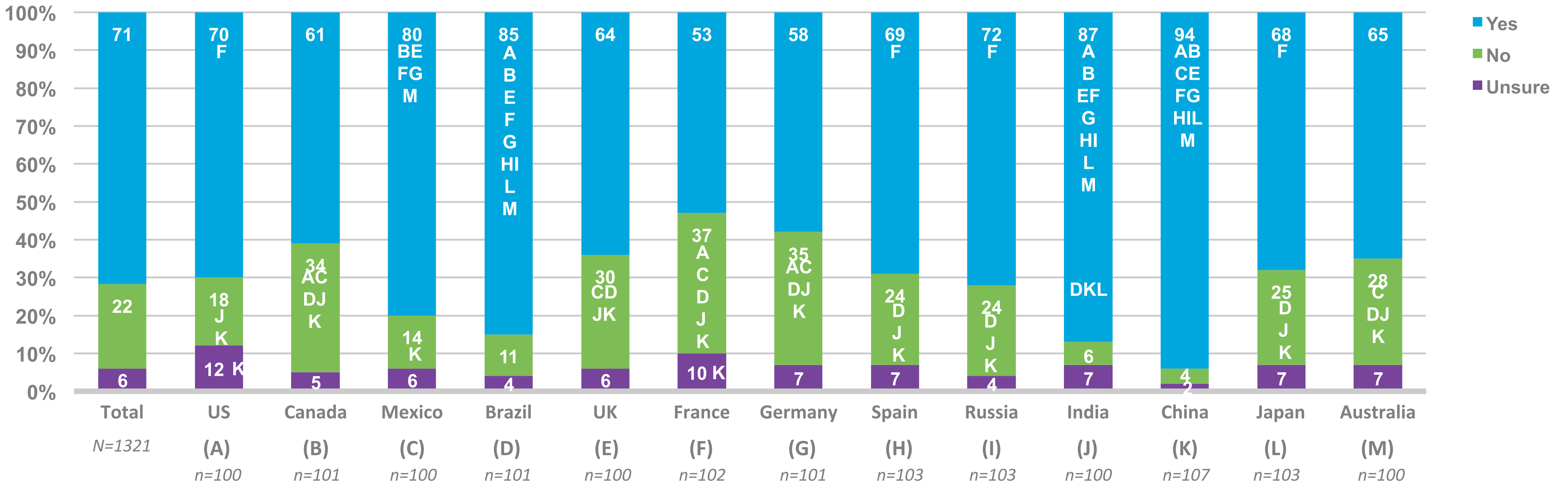
Q30. Using the scale below, where 1 is least important and 5 is most important, please indicate how important rolling out the following applications will be to your business over the next 12 months?

Note: Charted Net of 'Most Important 5' / '4' on a 5-point scale

Deploying More Applications

Driven by those in China, India, Brazil and Mexico, most ITDMs indicate IT is deploying more applications today, relative to one year ago.

In contrast, more than one third of ITDMs in France, Germany and Canada indicate IT is not deploying more applications today, compared to a year ago.



A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q31. Is IT deploying more applications today compared to one year ago?

Network Readiness To Support Initiatives
(Ready)

Roughly 6 in 10 ITDMs indicate their network is ready to support data center consolidation / virtualization and / or converging information technology with operations technology.

Significantly larger than most other countries, about two thirds of ITDMs in Germany indicate their network is ready to support moving applications to the cloud, while a similar proportion in Spain is ready to support Software Defined Networking.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Data Center Consolidation/ Virtualizing the data center	61	56	64 L	59	53	68 DL	57	71 ADIL	58	55	69 DL	77 ACDFHILM	49	59
Converging Information Technology with Operations Technology	60	65 M	64 M	52	56	53	61	69 CEM	67 CM	60	66 M	64 M	58	49
Moving your applications to the cloud	54	62 I	52	61 I	49	53	49	65 DFILM	63 I	39	59 I	52	49	49
Software Defined Networking	53	60 F	50	59 F	58 F	50	37	50	65 BEFGILM	50	57 F	61 F	48	47
Bring-Your-Own-Device (BYOD)	49	54 L	47	47	44	51 L	57 L	50	43	44	56 L	57 L	36	57 L

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q32. Is your network ready to support the following initiatives?

Network Readiness To Support Initiatives
(Not Ready)

ITDMs were most likely to indicate their network is not ready to support Bring-Your-Own-Device (BYOD), including 6 in 10 from Japan.

Further, those in Japan are considerably more likely to cite their network's lack of readiness for a variety of initiatives, compared to those in most other countries.

In France, the largest proportion indicate their network is not ready to support SDN, while in Mexico, most indicate it is not ready to support converging information technology with operations technology.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Bring-Your-Own-Device (BYOD)	41	38	43	42	44	39	33	37	45	48 FJM	33	37	60 ABCDEFG HJKM	31
Moving your applications to the cloud	38	30	41 G	31	46 ACGHJ	41 G	42 GH	25	27	54 ACGHJ	28	44 GHJ	45 AGHJ	46 ACGHJ
Software Defined Networking	34	29	38 H	29	34	30	47 ACEHJ	35	24	38 H	28	33	46 ACEHJ	36
Data Center Consolidation/ Virtualizing the data center	30	30	28	33	38 EGJK	23	37 EGJK	22	30	38 EGJK	21	21	46 ABEGHJK M	30
Converging Information Technology with Operations Technology	30	22	25	42 ABGHIJ	32	37 AHIJ	30	24	19	21	23	34 H	37 AHIJ	38 AGHIJ

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q32. Is your network ready to support the following initiatives?

Difficult IT Initiatives To Deploy

Overall, moving applications to the cloud and centralization / virtualization of the data center have been the most difficult initiatives to deploy for ITDMs over the past year, relative to average IT projects.

In the US though, the most difficult IT initiative to deploy over the past year was supporting BYOD, while in the UK, virtual desktop infrastructure emerges as most difficult.

On the other hand, roughly one quarter of ITDMs in Germany, the UK, Australia and France, indicate none of these initiatives were more difficult to deploy, compared to average IT projects.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
Moving your applications to the cloud	40	31	45 EGH	54 AEFGHI	45 EGH	29	36	30	29	39	48 AEGH	58 AEFGHILM	40	41
Centralizing/virtualizing the data center	38	38	40 E	34	43 EF	25	26	32	36	33	47 EFGM	58 ABCDEFG HIM	46 EF	32
Virtual Desktop Infrastructure	33	28	31	44 AGHI	37 I	34	33	29	24	21	42 HI	42 HI	39 HI	31
Supporting BYOD	30	42 DEFGH	35 H	29	25	24	26	26	20	28	39 DEH	37 H	28	31
Deploying SaaS applications	28	31 H	26	27	35 EH	20	22	28	17	29	39 EFHLM	46 ABCEFGHI LM	25	23
None of these	14	13 CDK	14 CDK	3	4	23 CDJK	21 CDJK	23 CDJK	17 CDK	17 CDK	8	3	17 CDK	22 CDJK

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q33. Which, if any, of the following IT initiatives have been more difficult, compared to average IT projects, to deploy over the past year? (Check all that apply)

Application Rollouts Without IT Involvement

About three quarters of ITDMs indicate business leaders and other non-IT teams at least sometimes rollout new applications (e.g., SaaS) without engaging IT.

Additionally, in the US and India, roughly 3 in 10 ITDMs indicate business leaders and other teams rollout new applications without engaging IT 'all the time' – significantly more than most other countries.

In contrast, close to half in Russia and more than one quarter in the UK, Germany and Japan indicate business leaders and other non-IT teams never rollout new applications without IT's involvement.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
All the time	18	32 BCEFGHILM	18	17	24 EGI	8	14	10	15	12	29 EFGHIM	22 EG	17	14
Sometimes	58	53	55 I	66 IL	53	56 I	65 IL	60 I	62 I	40	61 I	68 ADIL	50	60 I
Never	20	13	22 CJK	9	19 JK	31 ACFHJK	16	30 ACFHJK	14	47 ABCDEFGHJKLM	8	7	26 ACHJK	18 K
Not Sure	5	2	5	8 G	4	5	6 G	0	10 AGIJK	2	2	2	7 G	8 G

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q34. How often do business leaders and other non-IT teams roll out new applications (e.g. SaaS) without engaging IT? (Select one)

Point of IT Involvement

Most ITDMs indicate IT usually gets involved during the planning process, before the rollout of new applications.

Roughly 1 in 5 indicate IT gets engaged in the new application deployment process the day before rollout.

Among ITDMs **%**	**Total** (n=1321)	**US** (n=100) A	**CAN** (n=101) B	**MEX** (n=100) C	**BRA** (n=101) D	**UK** (n=100) E	**FRA** (n=102) F	**DEU** (n=101) G	**SPA** (n=103) H	**RUS** (n=103) I	**IND** (n=100) J	**CHN** (n=107) K	**JPN** (n=103) L	**AUS** (n=100) M
During the planning process	59	63 F	59	60 F	62 F	53	45	66 FJ	56	69 EFJ	51	60 F	61 F	56
The day before rollout	21	22	23	21	17	25	26	22	17	15	29 IL	18	15	27
During the rollout process	17	10	15	17	20	15	25 AGI	11	21	13	15	21 A	17	16
When the helpdesk phone rings	4	5	3	2	1	7	4	1	6	4	5	2	8 DGM	1

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q35. At what point in the planning/deployment process is IT engaged in the rollout of new applications? (Select one)

Planned Network Budget For Rollouts

More than 8 in 10 ITDMs indicate their network budget is properly planned to support new application rollouts most of the time.

Driven by 4 in 10 ITDMs in the US, nearly one quarter of ITDMs from the total sample indicate the network budget is always properly planned to support new application rollouts.

In Japan, a considerable 4 in 10 ITDMs cite their network budget is rarely or never properly planned to support rollouts.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
All the time	24	43 BDEFGHIK LM	21	30 IL	22	25 L	25 L	19	24 L	17	32 IL	26 L	12	21
Often	59	46	59	68 AL	65 AL	58	54	64 AL	58	61 A	56	67 AL	49	61 A
Rarely	15	9 C	19 CK	1	12 C	16 C	19 CK	14 C	17 CK	20 ACJK	9 C	7	32 ACDEGHJK M	16 C
Never	2	2	1	1	1	1	3	3	0	2	3	0	8 BCDEHK	2

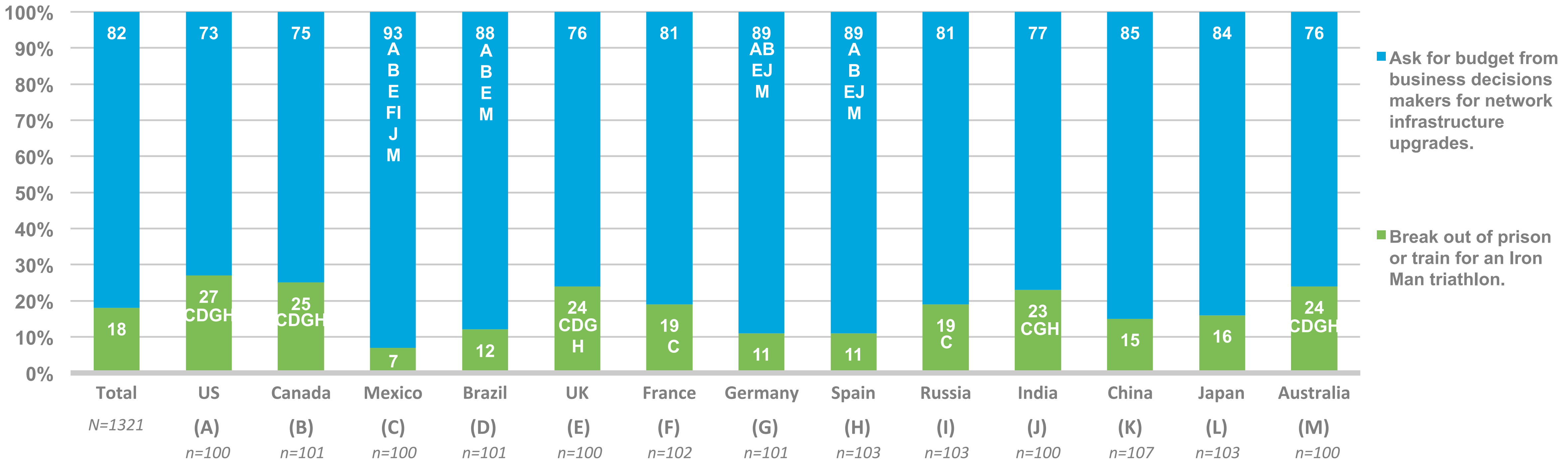
A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q36. Is the network budget properly planned to support new application roll outs? (Select one)

Asking For Budget Increases

Most ITDMs would prefer to ask for budget from business decision makers for network infrastructure upgrades, rather than break out of prison or train for an Iron Man triathlon – particularly those in Mexico, Spain, Germany and Brazil.

On the other hand, about one quarter of ITDMs in the US, the UK, Canada, Australia and India would prefer to break out of prison or train for a triathlon instead of asking for budget from decision makers for upgrades.



A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q37. Which of the following would you prefer to do? (Select one)

Managing The Network Vs. New Initiatives

Though half of ITDMs split their time evenly between managing the network and working on new initiatives, 1 in 5 indicate spending much of their time (75% of it) implementing and managing new initiatives.

Among more than 4 in 10 in Russia, the majority of their time is spent managing the network – significantly larger than ITDMs in most other countries.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
25% Managing Network / 75% New Initiatives	20	17	24 I	17	26 I	14	23 I	17	23 I	10	22 I	20	21 I	22 I
50% Managing Network / 50% New Initiatives	53	56	47	55	52	59	55	59	45	47	58	57	55	49
75% Managing Network / 25% New Initiatives	24	26	28 J	24	22	21	19	23	25	42 ACDEFGHJ KLM	15	22	20	25
More time than I spend with my family (over 75% Managing Network)	3	1	2	4	0	6 D	4	1	7 D	2	5	1	3	4

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.

Q38. Which of the following best describes how much time you spend managing and maintaining the network vs. new initiatives and other projects? (Select one)

Recognizing Good Work

Mainly led by those in India and China, most ITDMs from the total sample know they are doing their job well when they receive praise from their manager.

Within Mexico, Brazil, Spain and Japan, the largest proportion of ITDMs indicate knowing they are doing their jobs well when they receive thank you notes from their users.

More than any other country, Russian ITDMs realize they have done their jobs well when they are not contacted by anyone or when they are sleeping at home, rather than in the office.

Among ITDMs %	Total (n=1321)	US (n=100) A	CAN (n=101) B	MEX (n=100) C	BRA (n=101) D	UK (n=100) E	FRA (n=102) F	DEU (n=101) G	SPA (n=103) H	RUS (n=103) I	IND (n=100) J	CHN (n=107) K	JPN (n=103) L	AUS (n=100) M
My manager praises me	50	62 CEHIL	61 CEHIL	32	48 CHI	45 I	50 CHI	50 CHI	32	30	78 ABCDEFG HILM	70 CDEFGHIL	39	57 CHIL
My users send me thank you notes	42	39 G	45 EG	62 ABEFGHIJ M	51 EGM	29	40 G	18	38 G	41 G	39 G	63 ABEFGHIJ M	52 EGM	33 G
Nobody calls us	26	28 CD	31 CDJ	14	12	37 CDHJK	26 D	26 D	21	41 CDFGHJK	16	21	37 CDHJK	30 CDJ
I sleep at home instead of at the office	23	20 FK	22 FK	27 FJK	22 FK	25 FJK	6	36 ABDFJKM	30 FJK	42 ABCDEFJK LM	11	9	27 FJK	18 F

A/B/C/D/E/F/G/H/I/J/K/L/M = Significantly larger than the corresponding subgroup at the 95 % c-level.
Q39. How do you know if you are doing your job well? (Check all that apply)

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