

# The CIO & CISO 2023 HYBRID PRIORITY Report

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# INTRODUCTION

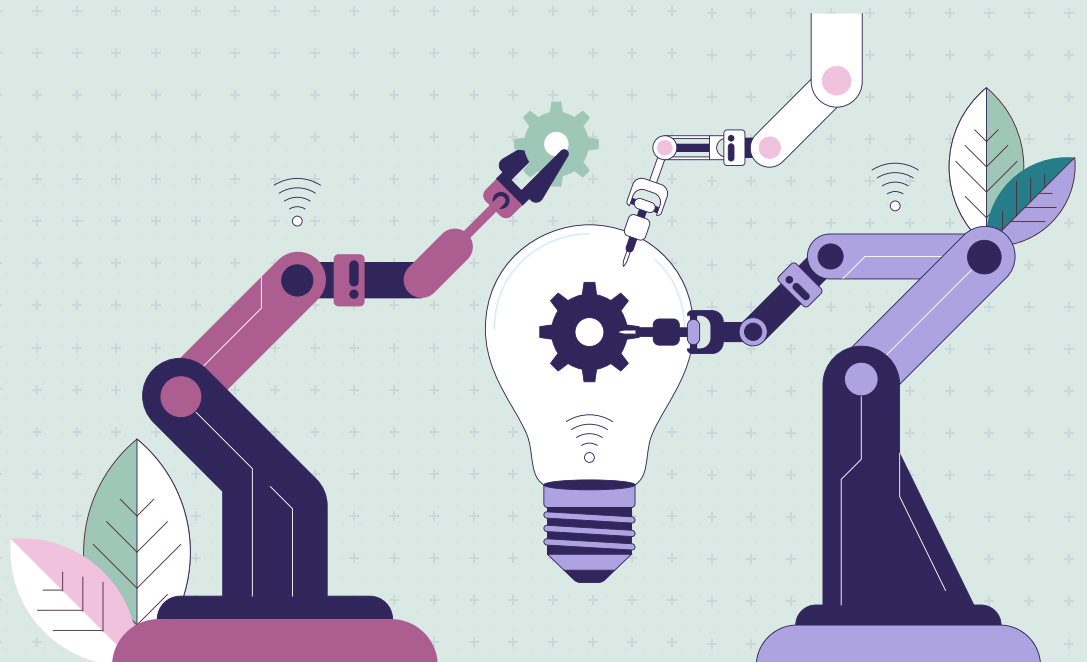
September 2022 marks 30 months since the pandemic threw the world of work into global turmoil. In that time, enterprises have changed outlooks, changed business models, and fundamentally changed the way we view work.

Among those seeing their roles evolve at the most demanding rates are CIOs and CISOs. Strategic innovation and security expertise are being taxed beyond perhaps any other skillsets reporting into CEOs. Their mandates are becoming more complex as that evolution continues at speed, which is why the future of CIOs and CISOs is now worth more investigation than ever before.

The central catalyst for this change, of course, is the proliferation of hybrid work. Now no longer a fad or stopgap, reaching a state of hybrid maturity is the new focus of global enterprises. That mandate lies squarely at the feet of CIOs and CISOs as they are now tasked with delivering hybrid transformation that's flexible, sustainable, and secure.

This report is designed to determine the sentiment currently prevailing within the CIO and CISO spheres around the evolution of hybrid work.

100% of surveyed CIOs and CISOs agreed that hybrid work and human centric approaches will be important in some degree to corporate success over the next five years, we aimed to compile the priorities and concerns that shaped this opinion, alongside the opinions that may contribute to the shaping of our hybrid future.



# RESPONDENT OVERVIEW

Before we dive into the headline statistics in the report, it's important to frame the response pool to provide context to the answers.

**69.2%**

of respondents identified themselves as CIOs or C-1 Innovation Decision Makers

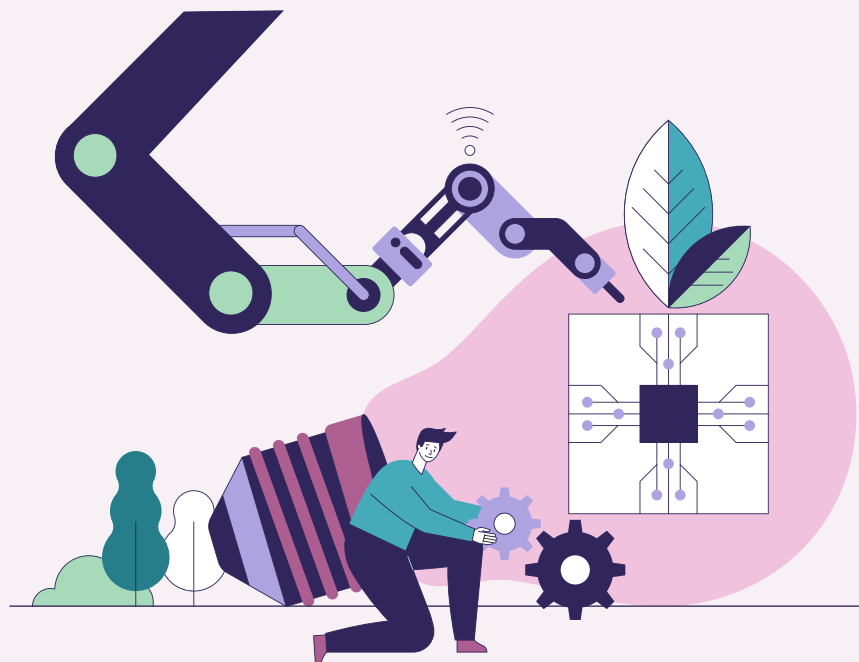
**30.8%**

of respondents identified themselves as CISOs or C-1 Information Security Decision Makers

The CIO prevalence is notable, and that context should be available to you when analysing the results of this survey.

In 2019, 38% of Fortune 500 companies didn't have a CISO or equivalent. Today, every single one does. So, while they represent 30.8% of the contributions to our survey, their rise to prominence over the last three years is undisputed.

It's also worth noting that CISOs are experiencing a shift away from their previous reporting line. 27% of CISOs surveyed in 2022 by in a recent Hitch Partners study report directly to the CEO instead of the CIO, up from 11% in 2019. Their importance is growing, and they're being increasingly separated from the CIO to avoid clashing heads in the battle between rate of innovation vs security.



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## CHAPTER 1

# The Pandemic Pivot

## Pre-pandemic, offices were corporate hubs

Before the Covid-19 pandemic, 86.4% of respondents worked in the office either *all the time* or the *majority of the time with some flexibility*.

## Post-pandemic, the hub is distributed

What started off as a necessity has become the preferred way of working across the board.

A miniscule number of companies are now committed to *returning to the office full time*, at just 3%.

81.8% of respondents are now working in an *even remote/office split* or in a highly flexible hybrid environment, *only in the office once per week*.

Hybrid work is here to stay, and the reasons have become abundantly clear.

Progressive business leaders are enjoying the benefits. Employees are happier, healthier, performing better, and feel a stronger connection to their employers. This reinforces the growing anecdotal evidence. An overwhelming majority of workers prefer the autonomy that hybrid work offers them, giving them more time in a work environment that is customisable to their wants, allowing them more freedom during breaks, and providing them with a much broader market of potential employers should they choose to switch companies.

### KEY TAKEAWAY

# 81.8%

of CIOs and CISOs are working in a hybrid environment post pandemic



Enterprises are now having to react to this autonomy, reshaping their operating models and throwing out established ways of working to accommodate a workforce that's focusing more on itself than ever before. For most, their ideal employment future centres around hybrid work.

With this comes added complexity for enterprise leaders to deal with. For many, it becomes a game of compromise; deciding where to innovate and push forwards and where to hold back. Security is a major issue, but so too is maintaining productivity and collaboration among a distributed team. Leaders are also worrying about attracting and retaining the right talent.

Nonetheless, leading enterprises are charting a way forward by reassessing their vendors and working alongside those with bespoke solutions dedicated to hybrid working. We advise that all CIOs take this on board, review their current vendor set up, and decide whether they are truly building towards a mature hybrid working environment for the post-pandemic era.



## CHAPTER 2

# Talent Retention Is Becoming Critical



The War for Talent is alive and well.

A majority, 77.3%, of CIOs and CISOs said that *attracting and retaining key talent* was among their top priorities for the next two years. 94% also agree that *attracting and retaining talent is becoming increasingly critical to their roles*.

The necessity for CIOs/CISOs to keep up with the rate of change has a large part to play. Market leaders are pushing the boundaries more and more each quarter, with increasingly specified technological expertise required to fulfil increasingly ambitious projects. This presents an additional challenge, as the demand for specialised talent currently outweighs the supply.

Chris Voce, Customer Engagement Strategist at Citrix, also believes that there are three facets of self-fulfilment that lead to happy, productive employees: “autonomy, mastery, and purpose.”

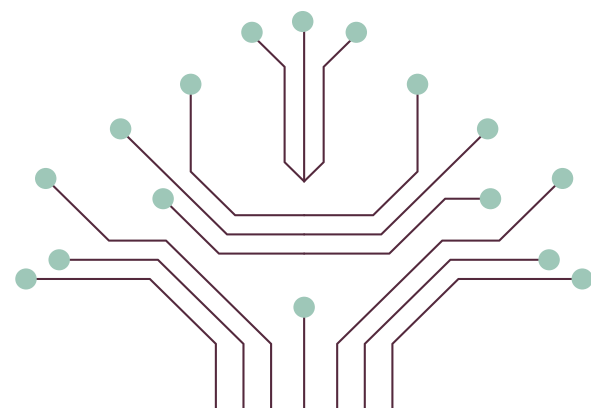
Creating an environment for your talent to realise these three facets is essential to retention in the current market. Let them lead, explore, make mistakes and learn at speed. Give them a reason to want to keep pushing the envelope and your enterprise will be all the better for it. In Chris’s opinion, that self-fulfilment cannot be over-valued.

Other key priorities that ranked highly were *automating manual, time consuming roles to increase value-adding opportunities* (69.7%) and *securing the hybrid workforce* (50%).

### KEY TAKEAWAY

# 94%

of CIOs and CISOs agree that attracting and retaining talent is becoming increasingly critical to their roles

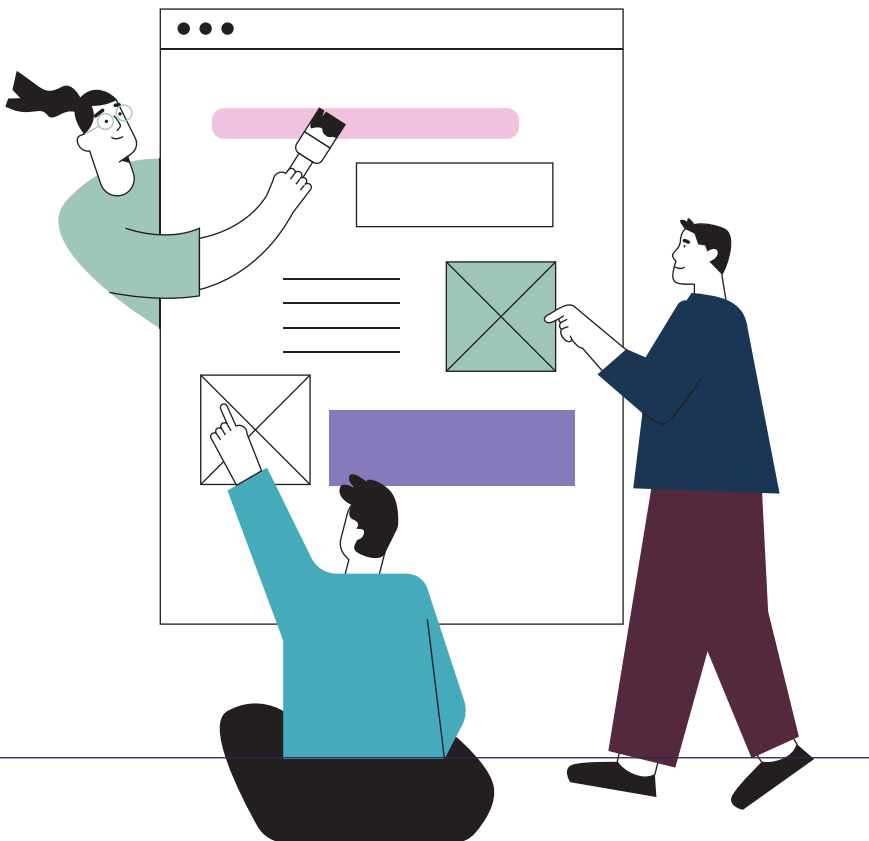


When it comes to retention challenges, however, there is a single clear outlier.

*Salary* is the number one talent retention challenge according to our respondents, with 83.3% sharing that sentiment. This points to a market that is hyper-competitive, and that employees with key skills are acutely aware of their demand, following the money to maximise their value.

New data detailed in an O'Reilly report also finds that hybrid and remote tech workers are earning more than their purely office-based counterparts, suggesting that one of two things must be true. Either organisations that have embraced remote and hybrid work are growing faster and are able to offer tech staff better salaries, or tech workers have created an employer market that suits their preferences by moving to companies that offer hybrid working options and have helped them outgrow their office-based competitors.

Whichever is true, it cements hybrid work as a key factor in acquiring and retaining the talent at the top of your wish list.



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**In order for somebody to reach a heightened state of productivity, they've identified three important things: autonomy, mastery, and purpose. And when you think about autonomy, it's somebody getting to choose how their work gets done. And that's what we're starting to see, that's the 'why' behind this, people have had a taste of that autonomy.**

**Chris Voce**  
Customer Engagement  
Strategist, Citrix





## CHAPTER 3

# What's Standing in the Way of Transformation?

When organisations transform, employees are often not involved until the key decisions have been made and implementation is beginning. In these instances, they experience what Gartner refers to as “cultural tensions”, or competing priorities they don't know how to balance. This can, in turn, manifest as feelings of uncertainty about the direction of the business and the strategic validity of their mandates. This affects 80% of employees during times of significant change and can severely hamper the progress of any transformation initiative.

Although cultural hurdles represent a headline statistic, it isn't the biggest hurdle for successful hybrid transformations. That distinction belongs to *skills and talent shortages*.

**65.2%**

skills and talent shortages

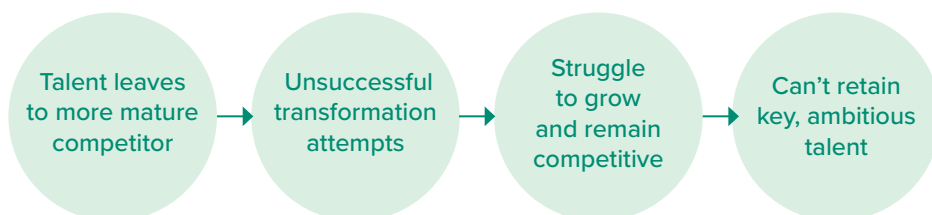
**40.9%**

the complexity of tasks

**34.8%**

securing executive buy-in

As detailed previously, the war for talent is affecting transformation-minded businesses in many ways. Organisations who cannot hang on to the key skills they need to successfully execute a transformation project are potentially being caught in a vicious cycle.



### KEY TAKEAWAY

**54.5%**

of CIOs and CISOs named *Cultural Hurdles* as a major hindrance to the success of hybrid transformation projects

## CHAPTER 4

# Meeting ESG Targets Is a Team Game

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### Green IT influence affecting vendor choice

Climate change, increased consumer pressure, progressive policies, and opportunities at the forefront of change mean that environmental, social, and governance (ESG) initiatives are carrying more weight than ever before.

Many enterprises are finding that, when it comes to the E in their ESG strategies, choosing vendors that offer sustainable solutions can help them make significant strides towards their goals. This kind of IT investment with an eye for sustainability is referred to as Green IT, and it's becoming increasingly important to progressive CIOs the world over.

This is especially true for industries that are disproportionately reliant IT infrastructure, such as telecommunications, finance, and banking.

When it comes to vendor choice, 38.5% of respondents rated it somewhat important and 32.7% rated it highly important to meeting their ESG targets.

The vast majority of surveyed CIOs and CISOs recognise the value that an ESG-conscious vendor can provide. Offsetting legacy infrastructure impacts and forming partnerships with environmentally and socially progressive vendors will both contribute to the bigger picture when it's time to disclose your metrics.

### KEY TAKEAWAY

# 71.2%

of CIOs and CISOs see vendor choice as somewhat or highly important to reaching their ESG targets



## Hybrid success & ESG goal allyship

47% of respondents listed *hybrid working as a top 5 priority for achieving their ESG targets*, with a further 25.8% placing it in their top 10.

It's no surprise that hybrid work is piquing the interest of the environmentally and socially conscious. Be they investors, consumers, or employees themselves.

Recent research by Spain's Institut de Ciència i Tecnologia Ambientals suggests that working from home four days a week would result in a 10% decrease in nitrogen dioxide in the air, the main pollutant emitted by motor vehicles.

The unanimous optimism around hybrid workers and their environmental impact has recently been challenged by new research coming out of the University of Sussex. This, however, doesn't offset the evolving race to achieve ever-more demanding ESG goals, a race in which vendors have a large part to play.

This represents enormous potential for businesses who are looking to “lead [and] follow” their way to net-zero, instead of being “drawn in kicking and screaming” as Simon Mingay, Research Vice President at Gartner believes will be the case.

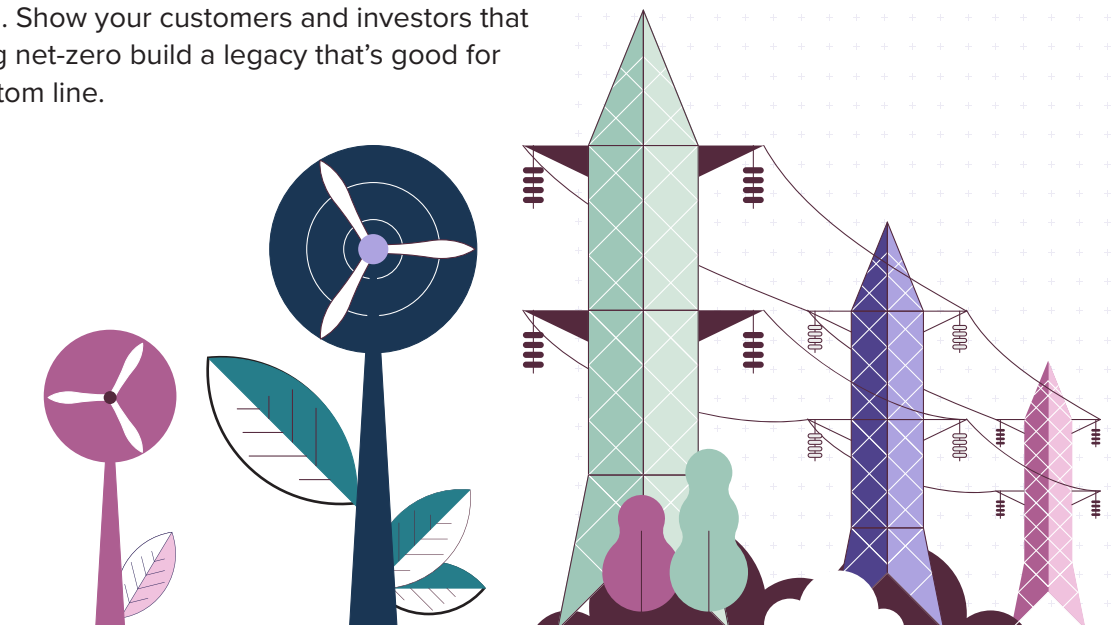
CIOs looking to improve their ESG scores should be scrutinising their vendor relationships to see if they are getting their performance or capability at an unnecessary cost to the environment. With ESG being so high on the executive agenda, the market is awash with innovative and sustainable solutions that deliver more while reducing your overall carbon footprint.

Our advice is to look for vendors that execute green principles in everything from their office design and internal operations to the energy consumption of their solutions. Show your customers and investors that you are committed to reaching net-zero build a legacy that's good for the environment and your bottom line.

“

**Every enterprise is on the pathway to net-zero whether they have decided this for themselves at this point or not. The only choice they have left is whether they want to lead, follow or get drawn in kicking and screaming.**

**Simon Mingay**  
Research Vice President,  
Gartner (speaking to  
Techtarget.com)  
Source



## CHAPTER 5

# Hybrid, Human-Centric Corporate Success



Our collective hybrid future looks set to unfold on a path of unabated expansion and improvement.

The qualitative data gathered here speaks for itself: the perception of security and innovation leaders is that a successful hybrid working model is an important factor in achieving corporate success over the next five years.

The aim is to reach hybrid maturity and begin reaping the benefits, but while much research has been done surrounding employee experience being improved overall by the shift to hybrid work, how does that directly translate into corporate success?

A recent [McKinsey & Company study](#) may be able to shed some light. By identifying six distinct modes of hybrid work on a sliding scale from rigid (full-time in office) to flexible (full-time remote) they isolated three areas where margins can be made, and advancements can be accelerated. These areas are access to talent, productivity, and cost of real estate.

In every metric, remote and hybrid work outperforms full-time office-based work. And studies like these couple with anecdotal evidence from observing their workforces have combined to create a compelling picture in the minds of most CIOs and CISOs. In fact, not a single respondent to this survey even listed hybrid work and human-centric approaches as low importance.

### KEY TAKEAWAY

# 89.4%

of CIOs and CISOs listed hybrid work and human-centric approaches as highly important or business critical to corporate success over the next 5 years

Over the next five years, 65.2% of CIOs and CISOs agree that hybrid working and human-centric approaches will be *highly important to corporate success*. 24.2% think it will be *business critical to corporate success*. 10.6% think it will be *somewhat important*.

The verdict is in. The link between hybrid success and corporate success has unanimous alignment.

CIOs and CISOs will need to use this unanimity to guide a collaborative effort towards a hybrid working model that enables their ideal of success. These ideals themselves, however, can introduce a wide spectrum of variability. With a vendor partnership that allows you to leverage industry-leading expertise, you can navigate those waters with the guidance of those with use cases that prove they know the way.



**Work is something you do, not something you go to. If you can do a good job, it doesn't matter where you are... I've had successful meetings while walking my dog.**

**Kurt Frary**

Deputy Director of  
Information Management  
& Technology / Chief  
Technical Officer (CTO),  
Norfolk County Council



## CHAPTER 6

# The Evolution of Cybersecurity

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The evolution of the cyber-threat landscape is no longer just a burden for security staff. Thanks in part to the establishment of hybrid work and its initial vulnerabilities, corporate security requires levels of investment we've never known before.

According to [Gartner](#), 88% of boards of directors now view cybersecurity as a business risk, no longer just a technology risk, leading to them getting increased visibility at board level and securing larger budgets. On the back of CISOs gaining more prominence, we asked how our respondents saw the cyber threat landscape evolving over the next two years.

66.7% of our CIO and CISO respondents agree that bad actors *will continue their current modus operandi of extorting the highest possible sums from each individual target*, showing that the majority believe that the end goal itself will not be tempered by heightened governmental awareness and regulatory scrutiny.

53%, however, believe that hackers will *look to escape the limelight by targeting SMEs*, as opposed to multinational giants and high-profile infrastructure. The [FBI](#) noted that after the 2021 attacks on Colonial Pipeline, JBS Foods, and Kaseya, hacker group behaviour shifted noticeably due to the increase in media attention they caused, which in turn accelerated state-funded and private-sector measures to mitigate threat.

### KEY TAKEAWAY

# 50%

of CIOs and CISOs believe that Managed Service Providers will be hacker groups' main targets over the next 2-3 years

And lastly, an even 50% believe *hacker groups will shift their focus to Managed Service Providers (MSPs)*, attempting to take advantage of the higher concentration of potential targets they present.

This coincides with a warning from the Five Eyes intelligence alliance (FVEY) this year, that the rise of MSPs has seen them become a target for bad actors. Specifically, they warn that state-funded advanced persistent threat (APT) groups are looking to exploit provider-customer network trust relationships.

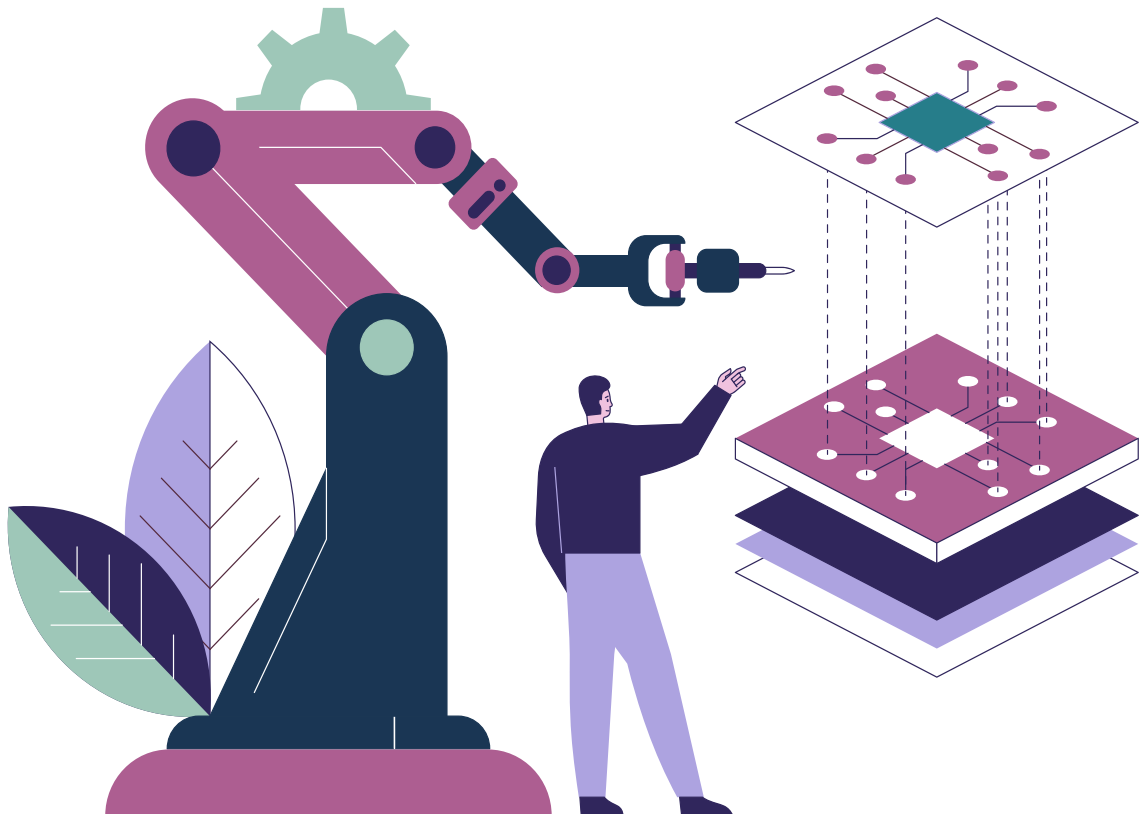
It paints a fluid picture of the cybersecurity landscape ahead. With state-funded groups having the resources and technological expertise to be flexible and change strategy whenever the environment calls for it, governments and enterprises alike are under increasing pressure to invest heavily into their security.

For hybrid maturity to be attainable, it must be built on a security framework that is as flexible in its prevention and response to threat as those who seek to undermine it.



**CISOs used to treat employees like terrorists, they're now treating them as allies. Staff are now rewarded for disclosing mistakes quickly because they're helping the overall organisation.**

**Gerard Lavin**  
Field CTO, EMEA,  
Citrix



## CHAPTER 7

# Future Trends, as Picked By You

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While we may all have some vision of a hybrid super future, it looks very different depending on who you ask.

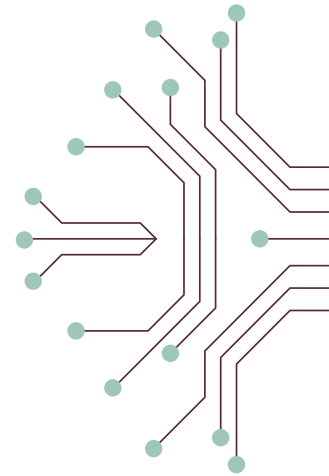
The most popular suggestions we received (10.6%) centred around artificial intelligence (AI), machine learning (ML), and robotic process automation (RPA) and suggested these be used to expand our hybrid capabilities.

AI translation tools to break down remote communication barriers and the expansion of RPA v2.0 were also mooted by our respondents, indicating that some see automation as a means to greater connectivity and collaboration as well as a pathway to realising a more value-added and productive future.

Another trend that's made its way into the consciousness of CIOs and CISOs is the Metaverse. 9.1% of our respondents see a hybrid future in which the Metaverse has an important role to play.

Suggestions include moving certain activities over to the Metaverse, while some are more concerned about the potential security threats, with one respondent stating that, "criminality will quickly establish a presence in these virtual environments."

This assessment is supported in part by Sasa Petrovic, Digital Strategy Director Citrix, who estimates that by the time the Metaverse becomes functional as a hybrid working solution, "attackers will have much more sophisticated tools at their disposal."



### KEY TAKEAWAY

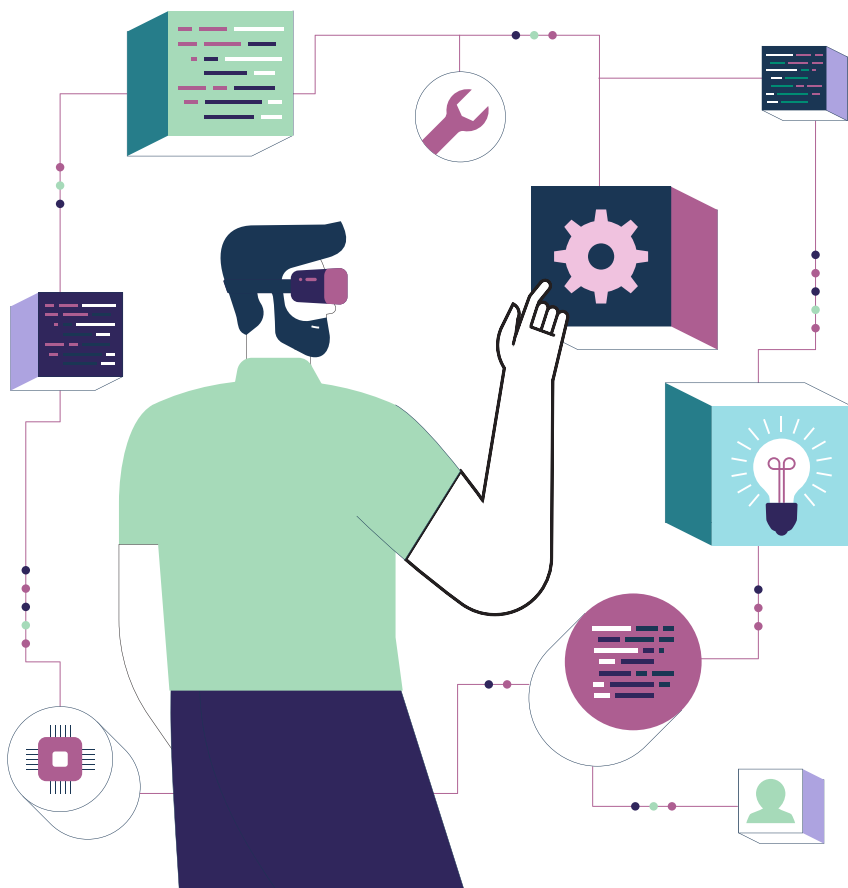
# 9.1%

of CIOs and CISOs highlighted the Metaverse as something to look out for in hybrid work over the next 2 years



It appears the Metaverse is currently enjoying some fresh air at the top of its hype scale, so is the next step a period of disillusionment? Or will the Metaverse begin delivering on the capabilities it promises?

If your enterprise can perceive any potential value from becoming Metaverse-ready, it's worthwhile dedicating a resource or two to exploration and value-finding. The hype surrounding this purported next phase of human connection is substantial and being caught far behind the trendline may end up being a costly and time-consuming exercise to remain competitive.



“

**We are already producing an insane volume of data. I think within metaverse this will just triple or quadruple. And at that point, the more data you have and the more interaction and interfaces you have, the higher the attack surface. On the other side, we'll have more bots and AI, and attackers will have much more sophisticated tools at their disposal.**

**Saša Petrović**  
Digital Strategy Director,  
Citrix



## Transform at Speed & Reach Hybrid Maturity with Citrix

With the modern hybrid landscape constantly evolving and demanding new solutions for enterprises to remain competitive, maximising your capabilities as a hybrid employer has become critical.

CIOs and CISOs agree on many hot-button issues, no more so than the importance of hybrid work to the overall success of their enterprises in the short-to-medium-term future.

There is also a consensus on the importance of retaining key talent, no doubt a symptom of the Great Resignation/ Great Reshuffle. That urgency doesn't look like it's going anywhere, with the demand for greater skills specificity only growing as transformation efforts accelerate.

Skills shortages and cultural hurdles are still holding organisations back from realising the full potential of their transformation efforts. While our respondents were split on how they believed the cyber security landscape would evolve over the next 3 years, highlighting the unpredictability of bad actors.

To navigate the unknowns of our hybrid future and make the most of our hybrid present, over 400,000 organisations have chosen Citrix.

Citrix specialises in solutions that create the most enjoyable hybrid environments possible. They enable the modernisation of the workforce by tackling individual use cases and providing a vast array of solutions tailored to the specific needs of each client. Their solutions are enabling hundreds of thousands to work seamlessly and securely in mature hybrid frameworks across the world.

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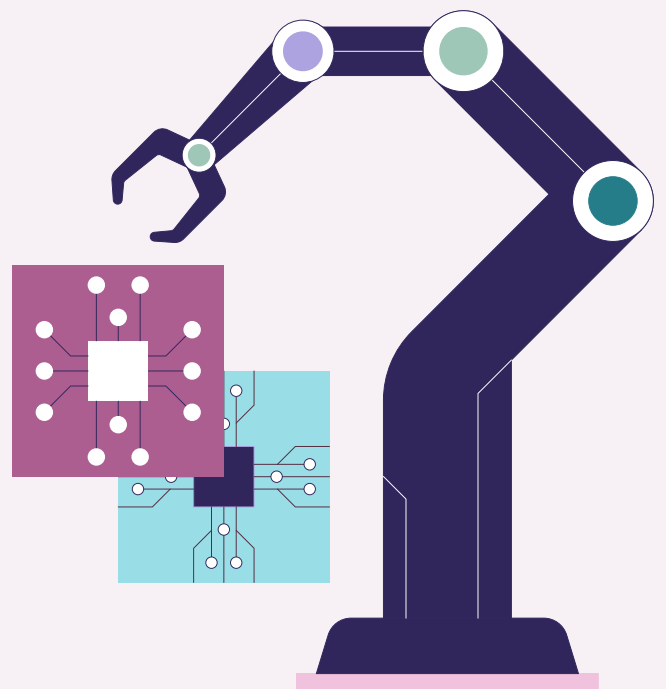
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