

2023 Voice of Our Clients

Findings from interviews with executives in

Defense & Intelligence



Top trends & priorities

| | Macro trends | Industry trends | Business priorities | IT priorities |
|---|-------------------------------------|--------------------------------------|--|---|
| 1 | Technology and digital acceleration | Cybersecurity protection | Protecting military organizations and operations | Cybersecurity protection |
| 2 | Changing social demographics | IT modernization and cloud solutions | Driving military operations | IT modernization, data center consolidation and cloud |
| 3 | Reconfiguration of supply chains | Assuring regulatory compliance | Collaboration across military operations | Embracing new IT delivery models |



Executives we interviewed

Annually, CGI leaders meet with executives across industries and geographies to gather their perspectives on the trends affecting their enterprises:



67%
C-level



33%
Operations



49%
Business leaders



51%
IT leaders



Digital strategy progress

From 2022 to 2023, the number of executives saying their organizations are producing expected results from their digital strategy remains unchanged. However, there is notable growth in other digital strategy stages.



Digital strategy in place

96%

Strategy operational

35%

(+9pp vs. 2022)



Producing expected results

16%

Launching strategy

25%

(+6pp vs. 2022)

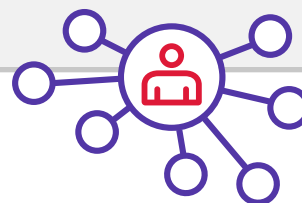


Key findings in Defense & Intelligence



Global impacts
felt more acutely
40%

cite high impacts of world economic
order shifts (+20pp vs. 2022)



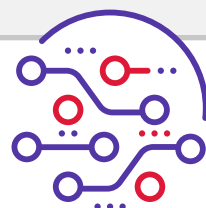
Collaboration remains
in focus
#3 business priority

includes SMART defense,
interoperability and reuse

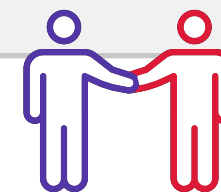


Supply chain
impacts increase
49%

acutely feel the effects of this macro trend,
+13pp vs. 2022



Embracing new IT delivery models
Use of SaaS, PaaS and agile rises to be
#3 IT priority (up from #5)







IT hiring challenges continue
89% cite having difficulty
in acquiring IT talent

Digital leaders in Defense & Intelligence

When comparing insights from the 16% producing results from digital strategies (**digital leaders**) to those building or launching digital strategies (**digital aspirants**), common attributes emerge.

For example, digital leaders excel in aligning business and IT operations and see legacy systems as less of a barrier to digital implementation.

| | | Digital leaders | Digital aspirants |
|---|---|-----------------|-------------------|
|  | Closely align IT and business to support strategy | 50% | 14% |
|  | Use more managed services for IT applications | 71% | 52% |
|  | Feel high impacts from digitization on their business model | 71% | 55% |
|  | See legacy systems as less of a challenge to digitization | 25% | 50% |
|  | Produce results from their cybersecurity strategy | 88% | 45% |

5 recommendations for anticipating and navigating world shifts

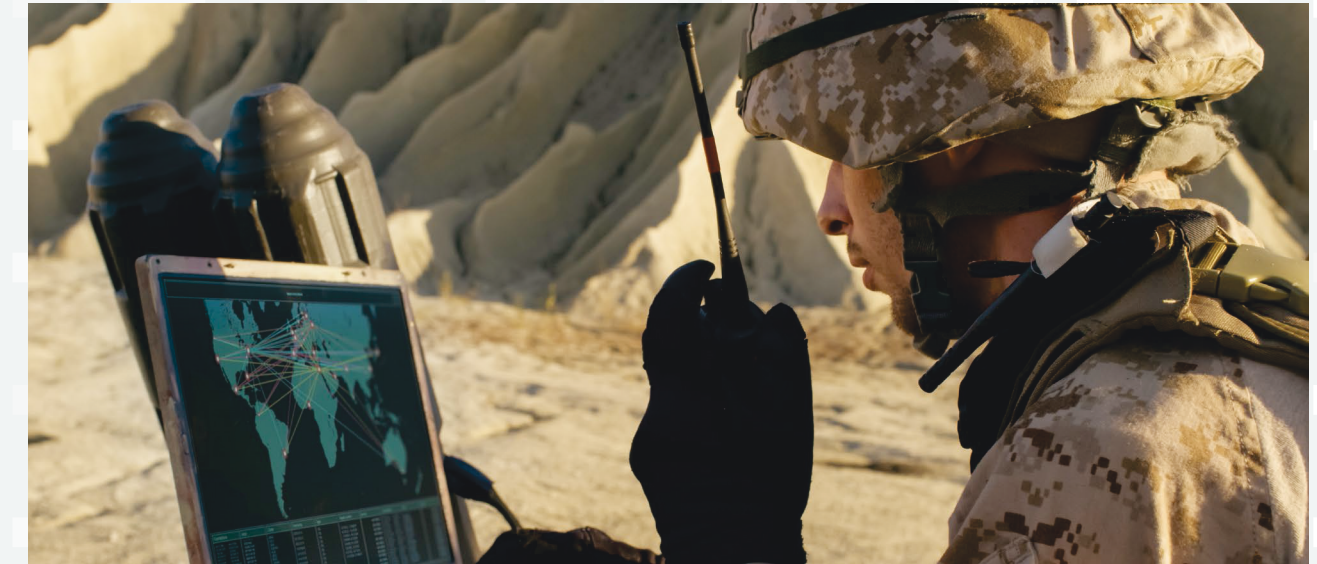
1 Increase operational response capabilities
geopolitical and world economic shifts are making disruptive events more likely.

2 Focus on interoperability
technological change and open standards require systems to operate reciprocally.

3 Collaboration with select industry partners
building a resilient chain ecosystem is key to future military superiority.

4 Use cloud capabilities appropriately
military cloud environments are needed for effective operations.

5 Rethink processes to attract young talent
flexible work, culture and modern technology are essential to attracting new talent.



At CGI, we help Defense & Intelligence organizations advance secure, efficient operations in a changing world.

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