2022 CIO and Technology Executive Agenda: A France Perspective

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By Analyst(s): Gabriela Vogel, Sachin Goel

Initiatives: CIO Role Evolution

Modular business capabilities that can be recomposed enable enterprises to outperform during disruptions like the pandemic. French enterprises trail in composability, but there's a window of opportunity for CIOs to close the gaps identified in the 2022 Gartner CIO and Technology Executive Survey.

Overview

Key Findings

- French firms are behind in business performance and digitalization.
- Gaps in three domains keep French enterprises from high business composability.
- French enterprises' biggest gap is composable thinking.
- CIOs and technology executives in France face tough choices with technology investments for business composability.

Recommendations

As a CIO or other technology executive in France seeking to evolve your role and to champion business composability, you should:

- Determine the current level of your enterprise's business composability by completing the self-assessment included below.
- Take advantage of France's recent strides in innovation by investigating whether your enterprise is eligible for government funds to support digital transformation. Seek out partnerships with digitally advanced companies that can teach your enterprise how to become more composable.
Survey Objective

The 2022 Gartner CIO and Technology Executive Survey was conducted to inform CIOs and other technology executives on how composability can improve business performance during times of volatility.

Data Insights

Like most countries, France is still experiencing a period of volatility due to COVID-19. France’s GDP fell 8% in 2020, one of the largest drops in the world. The French government and some enterprises understand the link between digitalization, resilience and economic recovery, but many organizations have not completely bought into this idea.

Business composability can increase competitiveness and enable enterprises to thrive during periods of volatility, such as the pandemic and its aftermath (see Quick Answer: What Does It Mean to Be ‘Composable’?). CIOs and technology executives in France have a window of opportunity to help their enterprises make up ground in business composability. Economists expect robust growth in 2021 and 2022, driven in part by the €100 billion stimulus package passed in late 2020. In addition, the “France 2030” initiative will direct €30 billion of public investment into technology and technology-dependent fields.

However, the 2022 Gartner CIO and Technology Executive Survey found that France respondents trail most peers globally in composability, and constrained IT budgets don’t leave much room for new investments. (See the Evidence section for survey details. Healthcare and government represent 40% of France respondents.) France CIOs should lobby CEOs and other business leaders to focus more on composability while prioritizing the largest composability deficits identified in the survey.

- Promote a high-trust, empowering culture by establishing clear guidelines, such as by implementing new leadership models that shift the culture from “no” to “how.”
- Seek increased funding of composable technologies and business processes from your business units by showing how incremental improvements in composability will increase business performance.
French Firms Are Behind in Business Performance and Digitalization

Business composability is a way of planning, organizing and operating based on reassembling modular components into new business capabilities and workflows. Modular design, the key principle of composability, makes it easier to adjust aspects of business that could not have been changed easily in the past to drive business value. In short, business composability is an antidote to volatility (see The 2022 CIO and Technology Executive Agenda: Master Business Composability to Succeed in Uncertain Times). Business composability can lead to better business outcomes.

Business composability is not entirely new. French enterprises already follow some of its principles to some degree. But French enterprises have a significant way to go to close the gap in business performance with both moderate- and high-composability enterprises (see Figure 1). Our survey asked respondents to compare their performance in the past 12 months (roughly from May 2020 to May 2021) against their peers’ on four dimensions:

- Overall business performance
- Revenue/funding
- Cost
- Risk

High-composability enterprises outperform French enterprises by over 30 percentage points on all four dimensions. France ranks 22nd out of 23 geographies, ahead of Japan and slightly behind Russia. Most of France’s fellow European economies — the Nordics; Belgium, the Netherlands and Luxembourg (Benelux); Germany, Austria and Switzerland (DACH); Spain and Portugal; and Italy — perform significantly higher on all four business performance questions. The only exception is DACH, which underperforms France in business risk reduction by one percentage point.
Figure 1. Enterprise Business Performance: France vs. Composability Enterprises

**Enterprise Business Performance**
Percentage of Respondents Ahead or Far Ahead of Peers and Competitors

<table>
<thead>
<tr>
<th>Category</th>
<th>France (n = 76)</th>
<th>High Composability (n = 143)</th>
<th>Moderate Composability (n = 1,860)</th>
<th>Low Composability (n = 289)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Business Performance</td>
<td>24%</td>
<td>42%</td>
<td>63%</td>
<td>19%</td>
</tr>
<tr>
<td>Increase Revenue/Funding</td>
<td>25%</td>
<td>39%</td>
<td>60%</td>
<td>20%</td>
</tr>
<tr>
<td>Reduce Business Risk</td>
<td>18%</td>
<td>27%</td>
<td>50%</td>
<td>11%</td>
</tr>
<tr>
<td>Reduce Operating Costs</td>
<td>15%</td>
<td>24%</td>
<td>47%</td>
<td>11%</td>
</tr>
</tbody>
</table>

n varies by segment, CIOs and technology executives answering, excluding “don’t know”

Q: Considering the past 12 months, rate your enterprise's business performance compared with its peers or competitors.

Source: 2022 Gartner CIO and Technology Executive Survey

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The performance of French enterprises trails that of both moderate- and high-composability peers in part because they also trail in digitalization (see Figure 2). French enterprises are more than two years behind high-composability enterprises on both the digitalization of internal processes and the generation of digital revenue. France ranks 19th and 21st, respectively, out of 23 geographies.
The French government seems to be aware of these gaps and has taken steps to make the country more business-friendly and more competitive, with special attention to innovation and technology. The economic stimulus passed in late 2020 includes €7 billion for digital initiatives, such as helping small and midsize enterprises with digital transformation. ³ The “France 2030” plan includes €2.5 billion to fund startups as well as investments for IT-adjacent areas such as electric vehicles. These steps seem to be paying off, with foreign multinationals making significant investments in France in recent years. ⁴ For example:

- Facebook announced that it would expand its Paris Artificial Intelligence team and spend $12.2 million on new equipment. ⁵
- Google will open four Google Hubs and add 1,000 jobs. ⁵
Germany’s software giant SAP pledged to spend €2.5 billion in France over the next five years.  

Toyota will invest €300 million to increase capacity at a plant in northern France, creating up to 700 new jobs.

This is all part of a larger effort toward economic recovery and making the economy more resilient in the long term. Thus, the business climate is becoming more favorable for digitalization and, by extension, business composability.

**Recommendations**

- Determine the current level of your organization's business composability by performing a self-assessment (see Figure 3). Rate your organization on a 1-7 scale on the three domains of composability. Those in between have moderate composability. These ratings will help you decide where to start in improving composability.

- Assess your digital strategy to accelerate decision making and drive execution. Use the Digital Execution Scorecard report to prioritize investments in digital capabilities and to focus efforts on their most important objectives.
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Figure 3. Business Composability Self-Assessment

**Composability Self-Assessment**

Q. To What Extent Does Your Enterprise Utilize These Principles?

<table>
<thead>
<tr>
<th>Composable Thinking</th>
<th>Composable Business Architecture</th>
<th>Composable Technologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our culture encourages the continuous exploration and creation of game-changing business capabilities</td>
<td>Business elements (e.g., capabilities, products, teams, processes, services, etc.) dynamically evolve to create new value</td>
<td>Technology assets and capabilities consist of modular components where assembly and reassembly are automated</td>
</tr>
<tr>
<td>Not at all</td>
<td>Rarely</td>
<td>Somewhat</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

**Interpreting your score:**

- You have high business composability if you scored 6 or 7 on thinking, business architecture and technologies.
- You have moderate business composability if you sit between the two other groups.
- You rate as low business composability if you scored 1, 2 or 3 on thinking, business architecture and technologies.

Source: 2022 Gartner CIO and Technology Executive Survey
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**Gaps in Three Domains Keep French Enterprises From High Business Composability**

Many French enterprises trail in composability, but they can find models close to home to help them make up ground. In fact, France has more high-composability enterprises than the world average (see Figure 4). Globally, 6% of survey respondents met the criteria for being categorized as high composability; 9% of French respondents did so.
Figure 4. Percentage of Respondents That Are Highly Composable Across Locations

Exactly what do we mean by “high composability?” We asked respondents to indicate the extent to which their enterprise utilized the principles within the three domains of business composability: composable thinking, composable business architecture and composable technologies (see Figure 5). High-composability enterprises practice all three principles “widely” or “extensively throughout the enterprise.” On average, France respondents’ utilization of these principles is significantly lower. France ranks in the bottom half of the 23 geographies in all three domains:

- Thinking: 21st
- Architecture: 17th
- Technologies: 13th
In France, CIOs and technology executives have strong technical backgrounds, so it’s not surprising that France ranks above average in the technologies domain. But engineers tend to be less comfortable with culture and people, which could explain why France ranks below average in composable thinking and composable architecture.

Figure 5. Extent of Composability

**Extent of Composability**

Average Scores on a Scale of 1 (Not at All) to 7 (Extensively Throughout the Enterprise)

<table>
<thead>
<tr>
<th>Category</th>
<th>France (n = 80)</th>
<th>High Composability (n = 150)</th>
<th>Moderate Composability (n = 1,921)</th>
<th>Low Composability (n = 316)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Composable Thinking:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our culture encourages the continuous</td>
<td>3.8</td>
<td>4.3</td>
<td>6.4</td>
<td></td>
</tr>
<tr>
<td>exploration and creation of game-changing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>business capabilities</td>
<td>2.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Composable Business Architecture:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business elements (e.g., capabilities,</td>
<td>4.5</td>
<td>4.8</td>
<td>6.4</td>
<td></td>
</tr>
<tr>
<td>products, teams, processes, services, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>dynamically evolve to create new value</td>
<td>2.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Composable Technologies:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology assets and capabilities consist</td>
<td>4.1</td>
<td>3.8</td>
<td>6.2</td>
<td></td>
</tr>
<tr>
<td>of modular components where assembly and</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>reassembly are automated</td>
<td>2.1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q. To what extent does your enterprise utilize these principles?
Source: 2022 Gartner CIO and Technology Executive Survey
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The good news for France CIOs and tech executives is that any improvement in composability will immediately increase business performance. The more composable the enterprise, the better the business performance. Thus, the enterprise doesn't have to wait until it has reached high composability to see benefits.

**Recommendations**
French Enterprises’ Biggest Gap Is Composable Thinking

The survey asked respondents about 30 actions that support business composability to identify the nine actions — three in each domain — most often taken by high-composability enterprises (see Figure 6). The following 9 practices will do the most to boost business composability:

**Composable Thinking**

1. Practice adaptive strategy to spot and respond to opportunities and threats.

2. Promote a high-trust culture that empowers employees to independently make decisions.

3. Empower internal functions, product teams, external allies and/or business partnerships to work together through autonomous, self-organizing networks.

**Composable Business Architecture**

4. Shape multidisciplinary teams to align on value, promote transparency, drive accountability and collaborate on demand.

5. Design business processes in parallel with technology capabilities.

6. Distribute accountability for digital outcomes beyond the traditional IT organization to other business units/business leaders.

**Composable Technologies**

- Raise awareness of business composability within your organization by introducing the concept to CEOs and other senior leaders. Present composability as a way to increase business performance during rising uncertainty, and stress that composability requires capitalizing on work that’s already been done, not a massive new effort.

- Take advantage of France’s recent strides in innovation by investigating whether the enterprise is eligible for government funds to support digital transformation. In addition, seek out partnerships with digitally advanced companies that can teach the enterprise how to become more composable.
7. Establish the continuous and effortless sharing of ideas and access to platforms, tools and know-how across internal functions, product teams, external allies and/or business partnerships.

8. Establish iterative development techniques (e.g., DevOps) as the default approach to development.

9. Create dynamic and easily deployable integration capabilities for connecting data, analytics and application components.

Figure 6. Nine Practices Distinguish Highly Composable Enterprises

n = 148, CIOs and technology executives from highly composable enterprises answering Q. Which of these practices does your enterprise follow completely and consistently? Multiple responses allowed.

Source: 2022 Gartner CIO and Technology Executive Survey
759688_C
French enterprises report the biggest deficits in the practices related to composable thinking (see Figure 7). Not only are they below average in this domain, but also, compared to other European nations, France is not investing enough in this dimension. In part, this explains the underperformance in overall business performance (see Figure 1). Composable thinking is the most important of the three domains because it makes the other two possible. Business architecture and technology cannot become composable unless people think and act in a composable manner.

In particular, France CIOs and tech executives should focus on building autonomous, cross-functional teams — only 18% of French enterprises have taken this action — and creating a culture of trust and independent decision making. On the one hand, cultural traits such as uncertainty avoidance and high power distance \(^8\) will make it harder to do these things. On the other hand, France’s long-term orientation and pragmatism are productive cultural traits to leverage in driving compostable thinking. Many CIOs will have to step out of their comfort zone to take these actions, but they are indispensable to making the business more composable.

**Figure 7. Key Composable Thinking Practices**

<table>
<thead>
<tr>
<th>Key Thinking Practices to Improve Business Composability</th>
<th>Percentage of Respondents Who Perform It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice adaptive strategy to spot and respond to opportunities and threats</td>
<td>64% (France 41%)</td>
</tr>
<tr>
<td>Promote a high-trust culture that empowers employees to independently make decisions</td>
<td>56% (France 28%)</td>
</tr>
<tr>
<td>Empower internal functions, product teams, external allies and/or business partnerships to work together through autonomous, self-organizing networks</td>
<td>51% (France 18%)</td>
</tr>
</tbody>
</table>

\(n\) varies by segment, CIOs and technology executives answering

Q. Which of these practices does your enterprise follow completely and consistently?
Source: 2022 Gartner CIO and Technology Executive Survey
759688_C
French enterprises also trail high-composability peers by a big margin in composable technology practices (see Figure 8). Although France CIOs are technology-oriented and do outperform their European peers in this regard, they have not necessarily thought about technology in terms of business composability. IT organizations have traditionally deployed technology to support operations, and that often meant scripting processes and providing access only to those involved in executing them. Composable business involves remaking products, processes, operating models and even business models whenever conditions change. The enterprise can't know what will be required next or who has relevant knowledge. Therefore, technology must default to openness. Hence, idea sharing and iterative development offer opportunities to improve composability.

**Figure 8. Key Composable Technology Practices**

**Key Technology-Related Practices to Improve Composability**

Percentage of Respondents Who Perform It

- Establish iterative development techniques (e.g., DevOps) as the default approach to development: 60% for High Composability (n = 142) and 32% for France (n = 78)
- Establish continuous and effortless sharing of ideas and access to platforms, tools and know-how across internal functions, product teams, external allies and/or business partnerships: 59% for High Composability (n = 142) and 25% for France (n = 78)
- Create dynamic and easily deployable integration capabilities for connecting data, analytics and application components: 58% for High Composability (n = 142) and 40% for France (n = 78)

n varies by segment, CIOs and technology executives answering

Q. Which of these technology-related practices does your enterprise use completely and consistently?

Source: 2022 Gartner CIO and Technology Executive Survey

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French enterprises have a smaller gap to close in the architecture domain (see Figure 9), yet are still outperformed by other European countries — Italy, Spain, Portugal, Germany, Switzerland, Austria, Belgium and Luxembourg. France needs to focus on distributing accountability and creating accountable multidisciplinary teams to collaborate. To improve composability, business architecture requires an organic combination of technology and the business, including creating teams that combine various tech and business skills, designing business processes and technology together, and making the business more accountable for technology outcomes. That is what composable enterprises are getting right.

**Figure 9. Key Composable Business Architecture Practices**

**Key Business-Architecture-Related Practices to Improve Composability**
Percentage of Respondents Who Perform It

- Shape multidisciplinary teams to align on value, promote transparency, drive accountability and collaborate on demand: 67% (High Composability), 47% (France)
- Design business processes in parallel with technology capabilities: 64% (High Composability), 49% (France)
- Distribute accountability for digital outcomes beyond the traditional IT organization to other business units/business leaders: 53% (High Composability), 38% (France)

n varies by segment, CIOs and technology executives answering

Q. Which of these practices does your enterprise follow completely and consistently?

Source: 2022 Gartner CIO and Technology Executive Survey 759688_C

**Recommendations**

To take composable thinking actions:
To take composable architecture actions:

- Identify the necessary culture changes to ensure that your team's behaviors are well-aligned to your enterprise's digital ambition (see Tool: Assessment of Culture Alignment to Your Enterprise's Digital Ambition).

- Start to decentralize decision making in your own team, and build a cultural transformation plan for the year (see Building Product Management Teams in IT and Beyond, Part 3: Mindset and Culture Change).

- Empower autonomous, self-organizing networks of teams by thinking like midsize organizations where CIOs do not have the luxury of having people with every IT skill (see How Midsize Enterprise CIOs Can Empower Small Teams to Do Big Things). Build business-IT fusion pods consisting of self-directed multidisciplinary teams. Empower them end to end, and start tracking the initiatives that are led by multidisciplinary teams.

- Promote a high-trust, empowering culture by establishing clear guidelines, such as by implementing new leadership models that shift the culture from “no” to “how” (see CIOs Must Build Trust to Help Teams Cope With Disruption).

- Practice adaptive strategy by using an agile/sprint model to develop adaptive strategy across different functions (see CIOs Need to Lead the Way to Adaptive Strategy).

To take composable architecture actions:

- Shape multidisciplinary teams by establishing collaborate-on-demand practices where business and IT form multidisciplinary teams for digital initiatives (see Fusion Teams: A New Model for Digital Delivery).

- Distribute accountability for digital outcomes beyond IT by agreeing on a standard charter for the high-performance team that holds the business and IT jointly accountable for success (see The Art of Building High-Performing Teams).

- Create an organization wide strategy for increasing the proportion of IT staff with the versatilist talent profile. Do this by working with HR to build an internal development program and develop a targeted recruiting strategy for attracting versatilist job candidates (see How CIOs Can Develop Versatile Talent for Digital Acceleration).
To take composable technology actions:

- Develop an application strategy that is modular, composable and resilient by using the Gartner Reference Model for Composable Enterprise Applications to define the organization's packaged business capabilities (PBCs). See Use Gartner's Reference Model to Deliver Intelligent Composable Business Applications.

- Design business processes and technology together by creating scenarios to identify the gaps in business processes, prioritize and fix the weaknesses.

France CIOs Face Tough Choices With Technology Investments for Business Composability

The 2022 Gartner CIO and Technology Executive Survey found that global IT budgets will increase 3.6% on average in 2022, but France respondents expect an average increase of 2.7%. Among the high-composability cohort, the average is 4.2% (see Figure 10). Here, France ranks 20th out of 23 geographies. The 8% drop in GDP in 2020 plays a role. In addition, fewer French enterprises will increase IT spending and more will decrease IT spending than the global average. Consequently, French CIOs will have less room to make new investments to support business composability. They may have to make difficult trade-offs.
Many France CIOs are investing in various technologies to support composability (see Figure 11). The survey found that some of the largest spending increases will go to technologies such as cloud, APIs, artificial intelligence (AI) and analytics, which play a big role in composability.

However, France CIOs must carefully consider their choice of investments to avoid diverting funds away from composability — depending on their industry. For example, 78% of France CIOs will increase investments in cybersecurity, one of the highest rates in the world. Leaders may take a zero-tolerance approach to cyber risk or have larger portfolios of applications that must be secured. Cybersecurity matters especially for the healthcare and government sectors, which accounted for 40% of the survey sample and may have influenced this result. France's 2022 defense budget will significantly increase spending on cybersecurity. In addition, 35% of CIOs plan to invest more in legacy applications, compared with 23% who will decrease spending.
Only two real gaps separate French enterprises from their high-composability peers on spending increases for composable technologies (see Figure 12). By 27 percentage points, more high-composability enterprises will increase spending on AI and analytics. France CIOs should focus on finding new funds to invest in these areas as part of a business composability initiative.
Figure 12. New Technology Investments: France vs. High-Composability Enterprises

Top 10 Technology Investment Areas for 2022 Among Highly Composable Enterprises
Percentage of Respondents

<table>
<thead>
<tr>
<th>Area</th>
<th>France</th>
<th>High Composability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artificial Intelligence/Machine Learning</td>
<td>60%</td>
<td>57%</td>
</tr>
<tr>
<td>Business Intelligence/Data Analytics</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>Cyber/Information Security</td>
<td>57%</td>
<td>78%</td>
</tr>
<tr>
<td>Integration Technologies/APIs/API</td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td>Architecture</td>
<td>37%</td>
<td>47%</td>
</tr>
<tr>
<td>Cloud Platforms</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Digital Business Transformation Initiatives</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Total Experience Solutions</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Hyperautomation</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>Legacy Application Modernization</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Digital Workplace</td>
<td>30%</td>
<td>23%</td>
</tr>
</tbody>
</table>

\(n\) varies by segment, CIOs and technology executives answering, excluding “not sure”

Q. What are the technology areas where your enterprise will be spending the largest amount of new or additional funding in 2022 compared with 2021?

Source: 2022 Gartner CIO and Technology Executive Survey 796988_C

Recommendations

- Increase support for composable technologies by directing new funding to AI, analytics, APIs and cloud. Also, review IT budget priorities to determine whether money could be reprogrammed from legacy technologies to composability.

- Seek increased funding of composable technologies and business processes from the business units by showing how incremental improvements in composability will increase business performance.

- Set cybersecurity policies based on business needs and business risk by implementing the CARE standard (see Figure 13 and Cybersecurity Is a Business Decision).
Figure 13. The CARE Standard for Cybersecurity

Primary Industry Roll-Up

- Healthcare Provider: 24%
- Government: 16%
- Manufacturing: 11%
- Services: 11%
- Insurance: 8%
- Other: 6%
- Financial Services: 5%
- Utilities: 4%
- Health Payer: 3%
- Life Science: 3%
- Transportation: 3%
- Education Provider: 1%
- Information Technology: 1%
- Media: 1%
- Retail: 1%
- Telecommunications: 1%
- Wholesale: 1%

n = 80 All France respondents

Q. What is your enterprise's primary industry classification?
Source: 2022 Gartner CIO and Technology Executive Survey 759688_C

Presentation Deck

View the Full Results

Additional Research Contribution

Melissa Rossi Wood

Evidence
Research Methodology

The 2022 Gartner CIO and Technology Executive Survey was conducted online from 3 May 2021 through 19 July 2021 among Gartner Executive Programs members and other technology executives. The total sample is 2,387, with representation from all geographies and industry sectors (public and private), including 80 respondents from France in various industries (see Figure 14).

The survey was developed collaboratively by a team of Gartner analysts, and was reviewed, tested and administered by Gartner's Research Data and Analytics team. Disclaimer: Results do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.

The 2022 CIO and Technology Executive Agenda report segments respondents based on self-reported extent of utilization of principles of composability. This segmentation allows a group of “high composability” enterprises to be identified as a best practices group to contrast the performance of others.

We define high-composability enterprises (n = 150) as those that utilize the principles of composable thinking, business architecture and technologies “widely” or “extensively throughout the enterprise.”

Low-composability enterprises (n = 316) utilize the principles of composable thinking, business architecture and technologies “not at all,” “rarely” or “somewhat.”

Moderate-composability enterprises (n = 1,921) encompass the rest of the sample.
Figure 14. French Survey Respondents by Industry

**Primary Industry Roll-Up**

- Healthcare Provider: 24%
- Government: 16%
- Manufacturing: 11%
- Services: 11%
- Insurance: 8%
- Other: 6%
- Financial Services: 5%
- Utilities: 4%
- Health Payor: 3%
- Life Science: 3%
- Transportation: 3%
- Education Provider: 1%
- Information Technology: 1%
- Media: 1%
- Retail: 1%
- Telecommunications: 1%
- Wholesale: 1%

n = 80 All France respondents

Q: What is your enterprise's primary industry classification?

Source: 2022 Gartner CIO and Technology Executive Survey 759688_C

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The 2022 CIO and Technology Executive Agenda: Master Business Composability to Succeed in Uncertain Times

Business Composability Helps You Thrive Amid Disruption

Becoming Composable: A Gartner Trend Insight Report

How Midsize Enterprise CIOs Can Empower Small Teams to Do Big Things

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