Expert talk

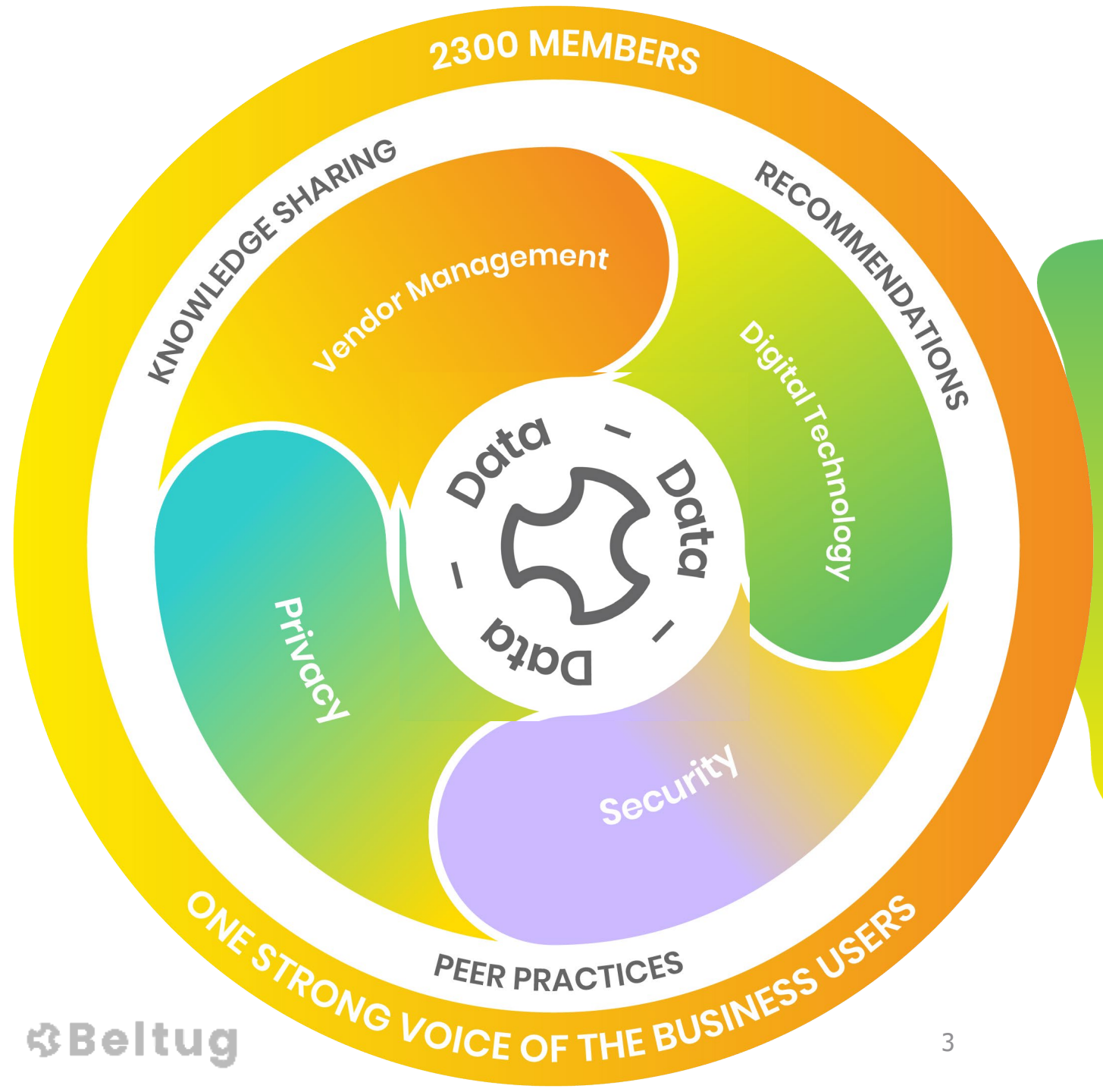## Het belang van cloud & cybersecurity in België

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Belgian association of CIOs and digital technology leaders.

2300 MEMBERS

RECOMMENDATIONS

KNOWLEDGE SHARING

Vendor Management

Digital Technology

Data

Data

Data

Privacy

Security

PEER PRACTICES

ONE STRONG VOICE OF THE BUSINESS USERS

Beltug

Editorial

Our world is becoming increasingly more digital. That is a reality no one can afford to ignore.

This digitalisation will offer many possibilities and opportunities, but it will also present us with major challenges, ranging from cyber security, countering fake news, balancing privacy and security in managing online data, and guarding the ethics of AI. And all these challenges require a response at the international, European and national levels.

For our Belgian businesses, furthermore, keeping up with market trends and future expectations in such a diverse market is challenging, yet necessary.

Moreover, business markets are often researched from an international perspective. Yet, there is also a clear need for reliable data on the Belgian market, representative for our economy.

Therefore, I am enthusiastic to see that this study brings together a variety of important topics: telecommunications, cyber security, artificial intelligence, and many more. Personally, I am a firm believer in evidence-informed policy making. And to that end, reliable data is crucial. This study may contribute to that.

I wish you an interesting read.

Petra De Sutter
Deputy Prime Minister and Minister of Public Administration, Public Enterprises, Telecommunication and the Postal Services

3 Technology take-up

In the B2B market study, we asked the organisations about their stance regarding a number of technologies. When comparing the results with the 2021 edition of the market study, we find that the uptake of AI, IoT and blockchain has remained more or less the same.

We note that interest in the Metaverse and Web 3.0 is still very low. However, we expect digital innovation around these technologies to accelerate in the coming years. This is clearly the case for AI and virtual reality glasses.
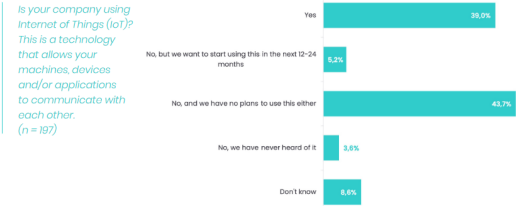
Last but not least, we see that the results for Private 5G have shifted significantly. With the arrival of 5G in Belgium, organisations have a more realistic perception.

3.1 Use of Internet of Things (IoT) remains equal

In our market study, we defined IoT as the technology that allows your machines, devices and/or applications to communicate with each other. We didn't differentiate between machine-to-machine applications versus IoT applications (based on whether or not a SIM card was used). However, we did add a question to gain insights into the use of mobile versus local networks.

"We see a rising ecological awareness, as our clients invest in IoT for sustainability. Solutions like energy monitoring, remote assistance or asset tracking and data collection are now available and manageable at massive scale, so one can really use them to make a difference."

Robin Joncheere
Country Managing Director, NTT

Is your company using Internet of Things (IoT)? This is a technology that allows your machines, devices and/or applications to communicate with each other. (n = 197)

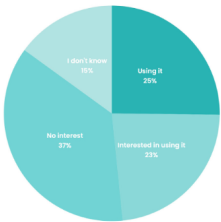|	
Yes	39,0%
No, but we want to start using this in the next 12-24 months	5,2%
No, and we have no plans to use this either	43,7%
No, we have never heard of it	3,6%
Don't know	8,6%

3.3 Significant, although stable, interest in Artificial Intelligence

Disclaimer: the survey was mostly carried out before generative AI like ChatGPT gained attention all over the media. We have certainly noticed that interest in AI has picked up as more people have begun discovering it actively.
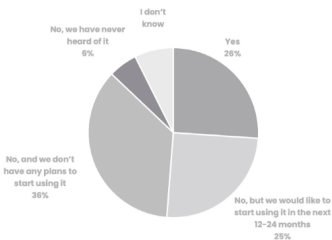
The use of AI has remained largely stable compared to the previous edition. As the graph shows, 25% of the large organisations are using the technology, while 23% are interested in its application. Again, to our surprise, this is almost exactly the same result as in the last edition, when it stood at 26% and 25%, respectively.

When comparing the 2023 results of the large organisations (typically the Beltug members) with the results for all Belgium-based organisations, the large organisations are (not surprisingly) using AI much more. As said, 25% of large organisations are using AI, compared to 7% to 10% for smaller organisations. Intuitively, larger organisations can be expected to have more data and more means to begin investing in AI. That is statistically confirmed in this B2B market study.

Is your company using or interested in using the following technologies by 2023? 2. Artificial Intelligence (n =197)

Using it	25%
Interested in using it	23%
No interest	37%
I don't know	15%

Does your business use the following technologies: Artificial Intelligence? (Results study 2021)

Yes	26%
No, but we would like to start using it in the next 12-24 months	25%
No, and we don't have any plans to start using it	36%
No, we have never heard of it	6%
I don't know	

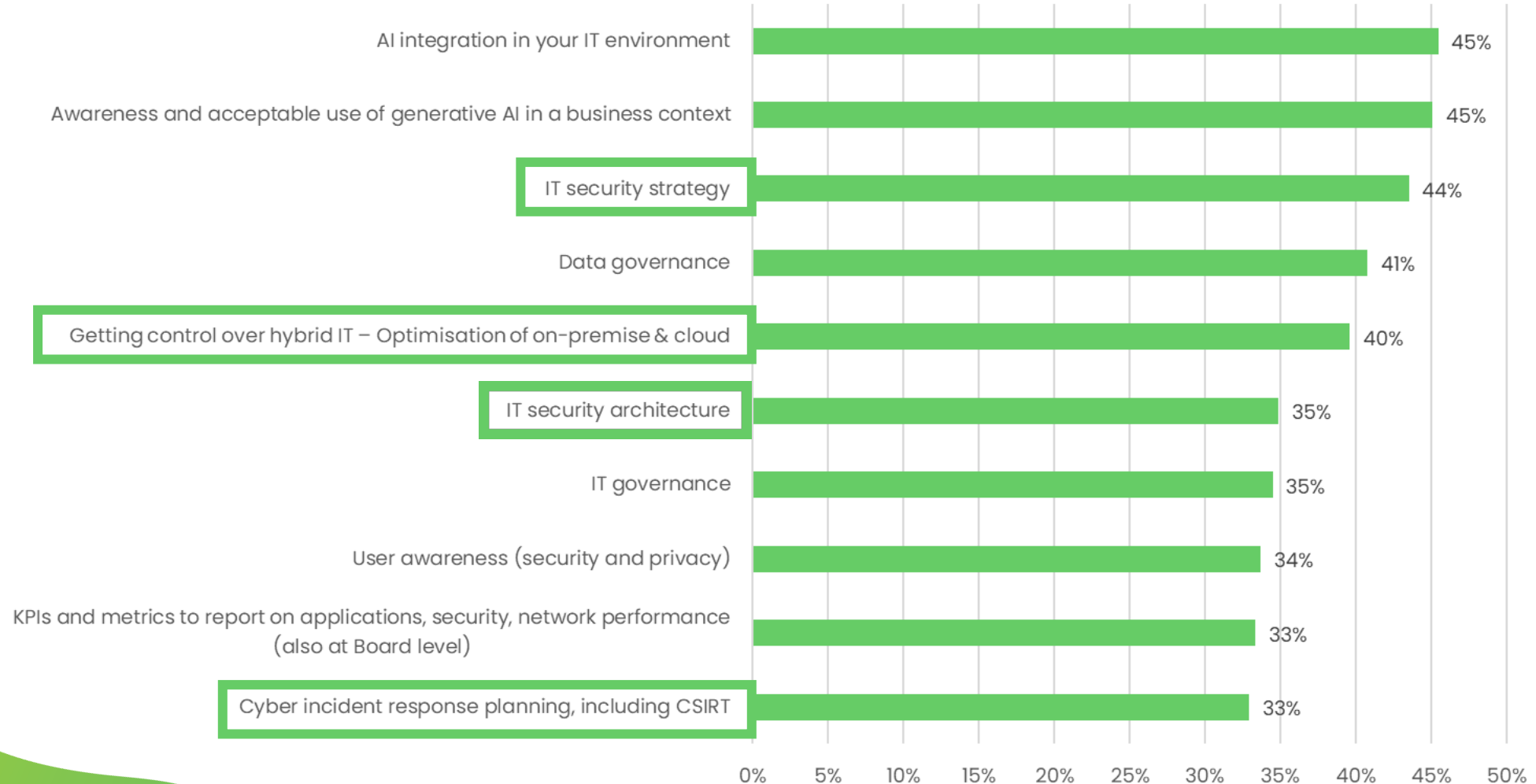# AI on #1

Top-10 Priorities of the Belgian CIOs & digital technology leaders 2023
(business users only)

Priority	Percentage
AI integration in your IT environment	45%
Awareness and acceptable use of generative AI in a business context	45%
IT security strategy	44%
Data governance	41%
Getting control over hybrid IT – Optimisation of on-premise & cloud	40%
IT security architecture	35%
IT governance	35%
User awareness (security and privacy)	34%
KPIs and metrics to report on applications, security, network performance (also at Board level)	33%
Cyber incident response planning, including CSIRT	33%

Top-10 Priorities of the Belgian CIOs & digital technology leaders 2024

(business users only)

Priority	Percentage
AI integration in your IT & business environment	~52%
Information security strategy	~41%
NIS2 – how to prepare for the implementation	~41%
IT governance	~40%
How to manage your vendors in compliance with DORA, NIS2 and other…	~38%
Security threats of AI	~37%
Making AI ethical, compliant and explainable; AI governance, assurance…	~35%
OT and IT security roadmaps	~35%
Getting control over hybrid IT – Optimisation of on-premise & cloud	~34%
Information security architecture	~34%
Data classification & leak/loss prevention in the world of cloud and AI	~34%

Security vs. IT management priorities 2024
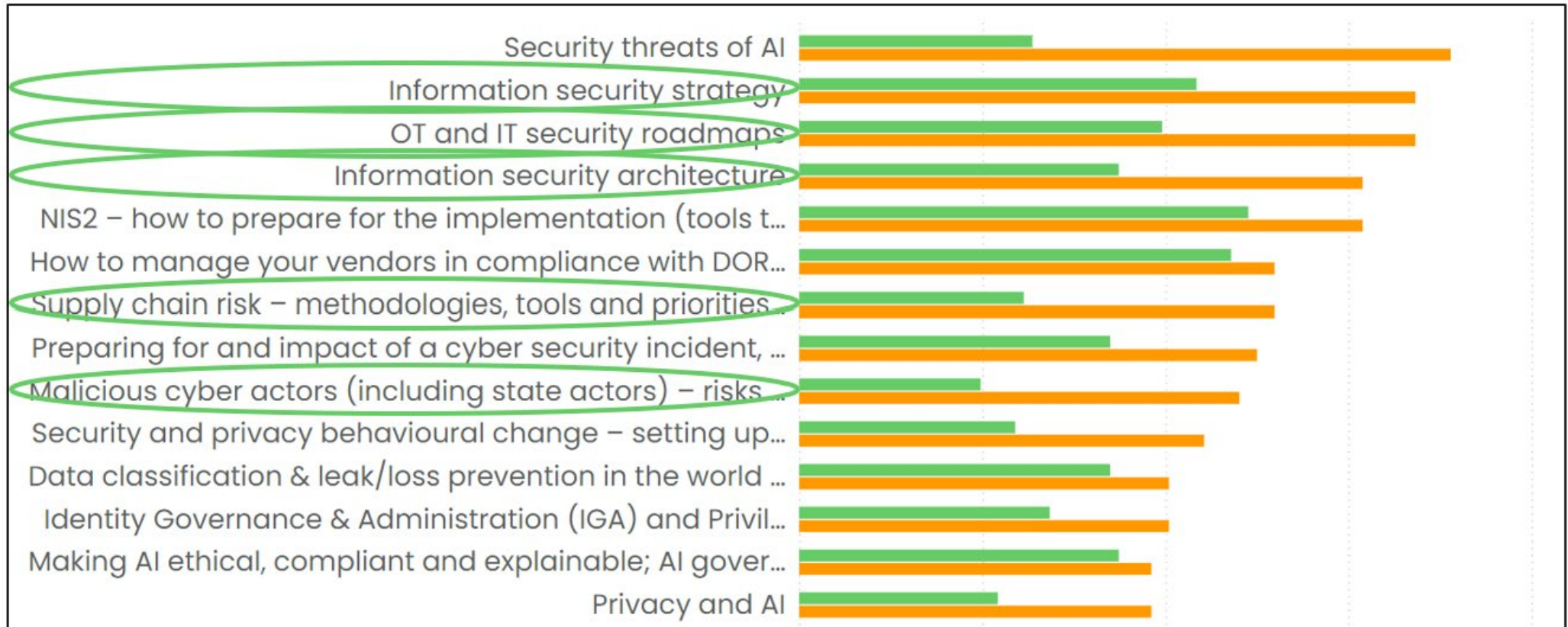
Public vs. Private sector priorities 2024

Remains a
dominant theme

Security

Security investments
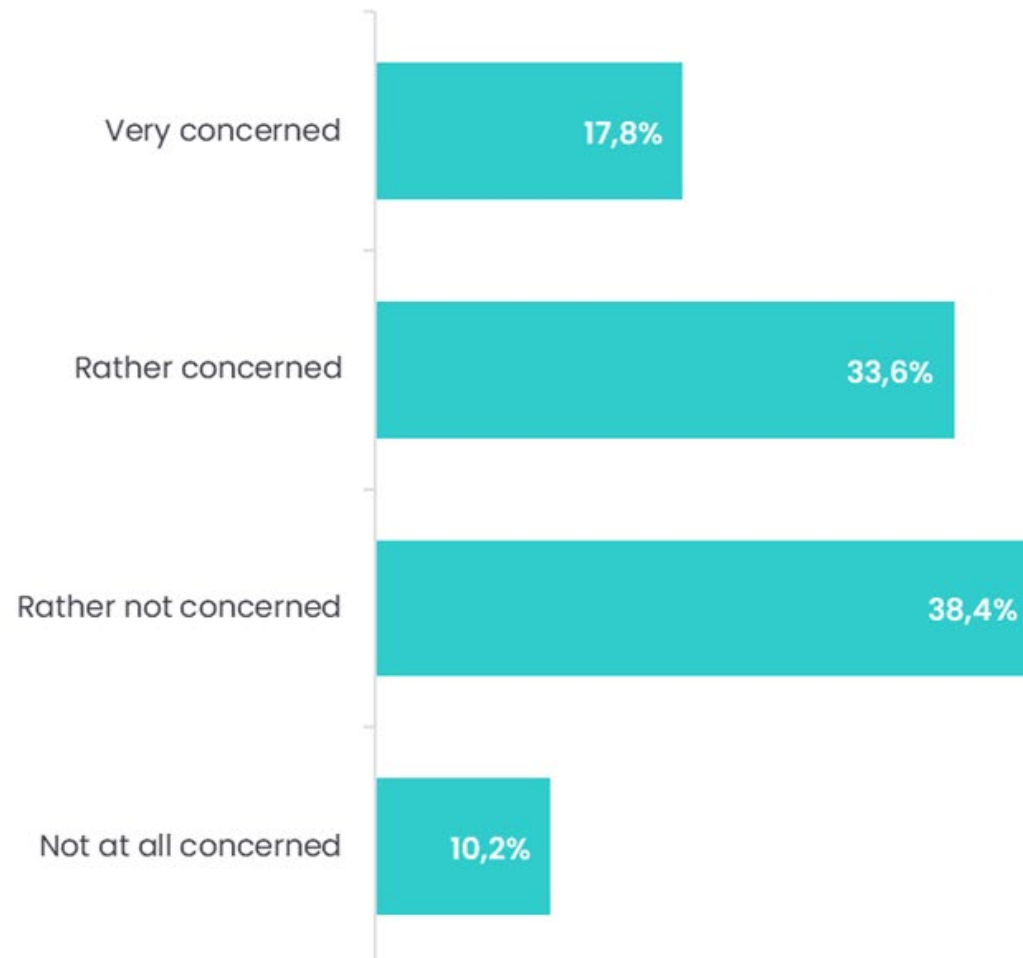
68%
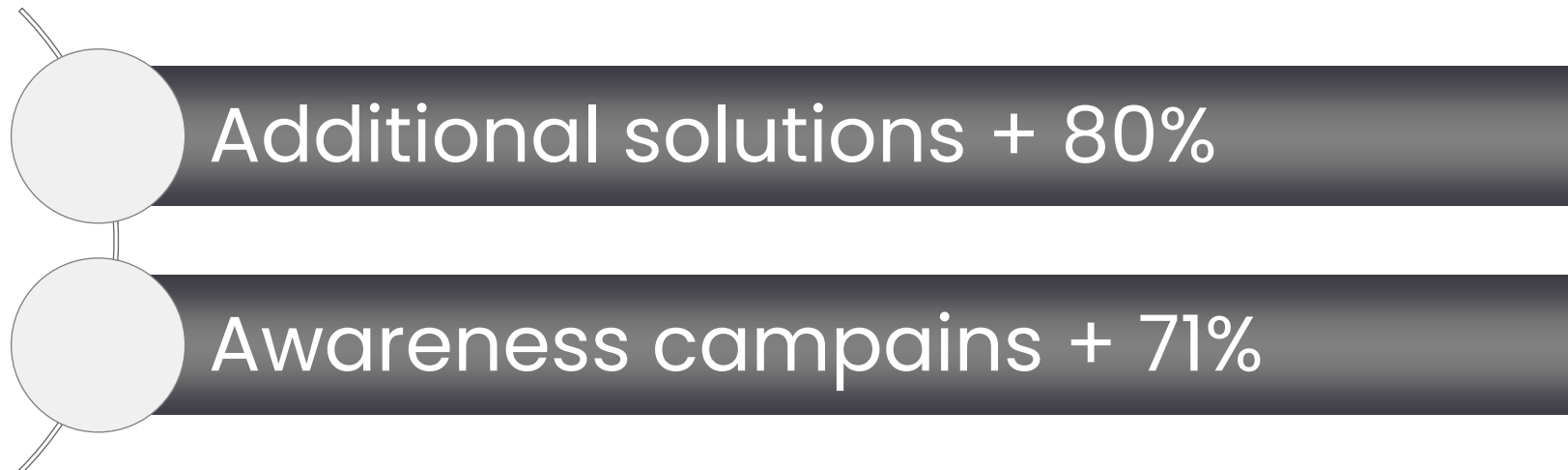
Additional solutions + 80%

Awareness campains + 71%

IT architecture

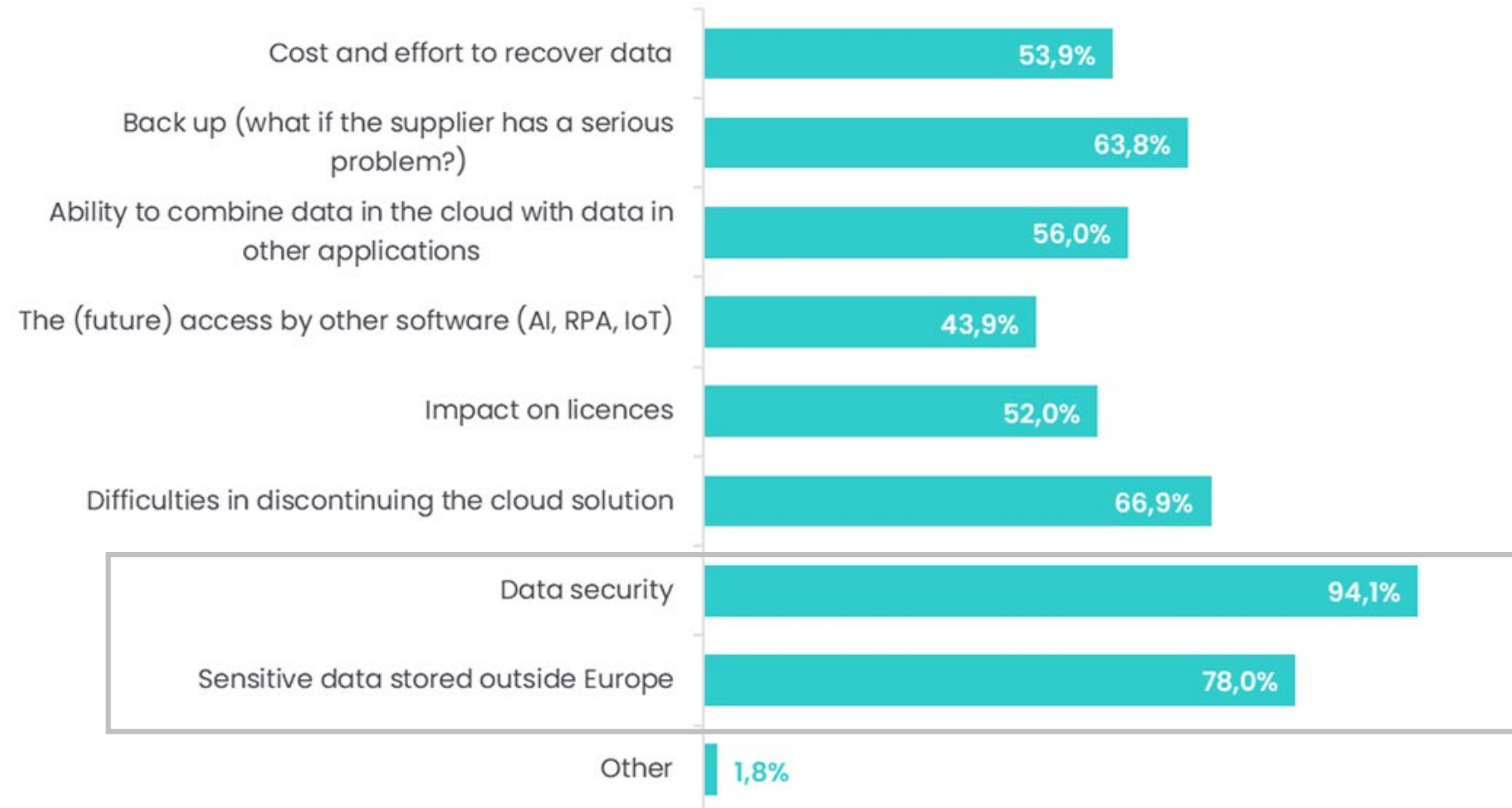# Beltug market research, data in the Cloud

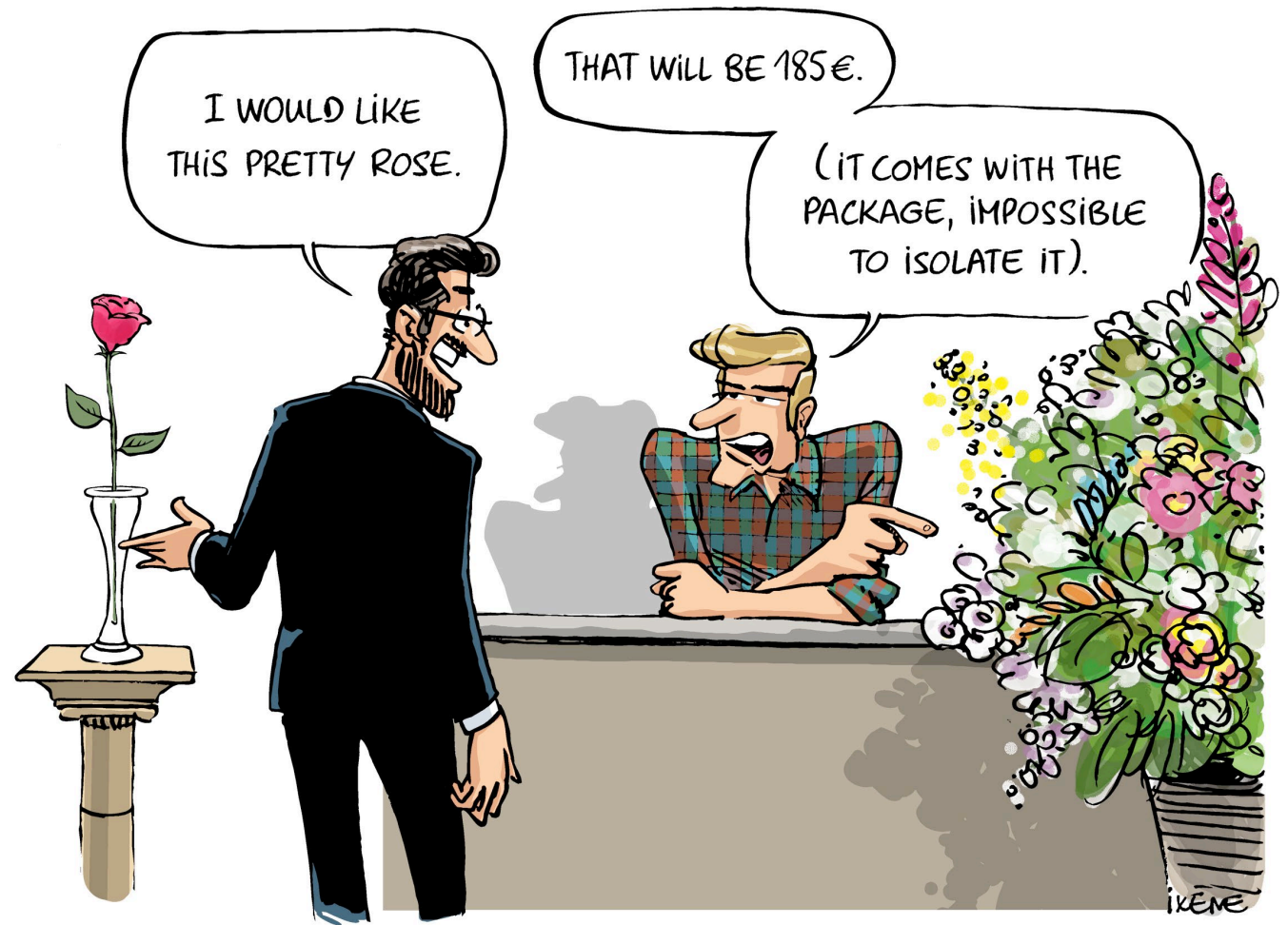To what extent are you concerned about data stored in the cloud? (+200 FTEs; n = 197)

Very concerned — 17,8%

Rather concerned — 33,6%

Rather not concerned — 38,4%

Not at all concerned — 10,2%

Beltug market research, data in the Cloud

What are you concerned about in relation to data stored in the cloud? (+200 FTEs; n = 118)

| Concern	Percentage
Cost and effort to recover data	53,9%
Back up (what if the supplier has a serious problem?)	63,8%
Ability to combine data in the cloud with data in other applications	56,0%
The (future) access by other software (AI, RPA, IoT)	43,9%
Impact on licences	52,0%
Difficulties in discontinuing the cloud solution	66,9%
Data security	94,1%
Sensitive data stored outside Europe	78,0%
Other	1,8%

Imbalance cloud providers – business customers
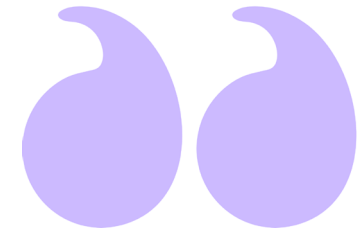
11 Fair Principles

No Digital Transformation without Change Management

"
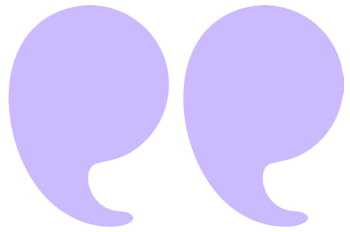
The hardest part of digital transformation is change management – not the process but rather user acceptance.

Changing habits remains difficult.

"

Sammy Frivaldszky, CIO, Daoust

Beltug

Thank you!

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