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Thought Leadership

BCI Continuity and Resilience Report 2023



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Foreword

Welcome to the 2023 BCI Continuity and Resilience Report. The report provides an annual insight into the business continuity and resilience industry and reviews how the industry is changing, how resilience roles are adapting accordingly, and how the profession is likely to change in the future. We are once again very grateful to Riskonnect for their continued sponsorship of this report.

This year's report has shown a notable shift towards embedding resilience practices and processes. The pandemic saw organizations seeking to explore new ways of being more proactive rather than reactive when it comes to resilience planning, building resilience into new remote working practices, introducing 1-2 page incident specific plans, and moving towards planning for the effect of a crisis (e.g. all staff able to work but have to work remotely during/following a crisis) rather than the cause (detailed pandemic plan). The report shows that now these 'new' ways of working have become embedded, professionals are moving to formalise these processes and ensuring processes and planning evolve to support them.

A promising finding of this year's report is that three-quarters of respondents state that responsibility for resilience now lies with the c-suite, as per good practice. This demonstrates a growing understanding of the importance of embedding resilience across all tiers of an organization, which can only be truly effective if it is led from the top. Furthermore, traditional business continuity roles are expanding to consider more strategic elements and, this year, practitioners rated their roles as 53% strategic and 47% operational on average. This follows the trend noted in previous years that professionals are starting to become trusted advisors on longer term resilience issues; and shows that professionals' focus is expanding from traditional operational duties (developing plans, conducting risk assessments, and ensuring services can be restored after a disruption) to also include strategic responsibilities, such as gathering intelligence on emerging risks and providing proactive guidance on the strategic measures that organizations should take to improve their resilience.

As roles expand, so do the attributes required to fulfil them. Respondents were asked which attributes they consider are important in their roles and responses showed a similar trend to last year with being able to 'make things happen' (76.8%), being relationship builders (76.4%), being empowering (74.6%), and being empathetic (73.9%) amongst some of the top responses received. However, this year we are seeing some of the more traditional skills shooting to the top of the table, hinting that professionals are ensuring that the tried and tested rules and principles remain the backbone of the changing industry: being 'process orientated' (83.5%) and 'a good planner' (79.0%) are the top two attributes of a resilience manager in 2023. Furthermore, as the skills field becomes more complex and competitive, the importance of education from an academic (71.3%) and professional (67.4%) perspective has shifted towards the top half of the table this year.

Overall, the industry has gone through an exciting shift over the recent years and it is refreshing to see that these new processes and procedures are maturing, with organizations now embedding them into business-as-usual practices.

I hope this report provides members and resilience professionals with a sound overview of the state of business continuity and resilience, but also contains learnings which can be of immediate use within readers' organizations. The BCI is very grateful to the participation of our members and contacts for filling in the survey and taking part in interviews and would once again like to thank Riskonnect for their sponsorship of this important report.



Rachael Elliott
Head of Thought Leadership
The BCI



Foreword

Riskonnect, who acquired Castellan Solutions in July 2022, is very pleased to sponsor the BCI's Continuity and Resilience Report 2023. This year's report offers insights specific to how practitioners and stakeholders perceive the business continuity and resilience discipline, with survey participants coming from many different industry sectors. The report also examines the challenges the business continuity and resilience discipline faces amid the rise of new working environments.

In my opinion, there are several interesting findings in this report, some positive and some that leave us with opportunities for improvement.

For the third year in a row, survey respondents noted that the business continuity and resilience discipline continue to tilt toward being more strategic in terms of its outcomes.

Naturally related to this finding, a significant majority of respondents noted that a member of the c-suite maintains accountability for the outcomes stemming from continuity and resilience efforts, with others being delegated responsibility for carrying out the tasks necessary to achieve a more resilient state.

With the c-suite accountable for the outcomes of the continuity and resilience programme, it's also not surprising that 36% of respondents noted an increase in financial and resource support for their programmes, with an additional 5% commenting that they received additional financial support and an additional 25% commenting on additional non-financial resources being made available.

Lastly, over 50% of respondents indicated their organizations have a continuity or resilience team, with an implied focus on coaching and influencing the organization to mitigate disruption-related risk and building a strong response capability.

I think this finding relates strongly to certain future expectations ranking highly, including an uptick in cross-team collaboration, growing leadership support and engagement (including the board,) and increased training investment (which I expect would include exercises).

Two findings caused me some concern. The first has to do with terminology and the influence on organizational structure and perceived programme outcomes. 50% of respondents say there is no difference between business continuity and resilience and 39% say there is in fact a difference. With the introduction of other terms — organizational resilience, business resilience, etc. — there appears to be even greater confusion. My fear is that unless we seek agreement within our profession on this point and cascade this clarity to our business sponsors, there will be confusion and potentially some gaps in meeting their expectations.

Lastly, 74% noted the use of some form of software to manage their programme, whether developed in-house or commercially acquired. Although this sounds like a high percentage, given increasing organizational complexity, especially when taking into account elongated supply chains and various customer delivery channels, it's hard to imagine running a programme — and responding to a disruption — without software.

Overall, the report shows promise as to the direction of our profession and the discipline in general. I only wish for more standardisation on terminology, approach, and outcomes to enable stronger cross-organization coordination, as well as less confusion with our business stakeholders. Perhaps we'll see that in 2024!

I hope that you enjoy reading this report and trust it will provide insights that help shape your thinking on how business continuity and resilience concepts can introduce more and more value to your organization as you plan for the next calendar year and beyond.



Brian Zawada, FBCI,
Vice President — Strategy and Innovation,
Riskonnect.

Executive summary





The adoption of resilience is becoming increasingly evident within organizations.

While some organizations are still advancing in terms of resilience leadership, the majority are now witnessing the integration of resilient processes as common practice. Silos are breaking down, reporting structures to boards are being streamlined, and the involvement of business continuity (BC) managers and resilience managers in strategic discussions is on the rise within organizations.

Half of respondents said their organizations had yet to define clear differences between BC and resilience. However, there is a *de facto* differentiation of roles.

The main outcomes related to BC identified by respondents are minimising internal impact when faced with a disruption and creating plans to respond to and recover from disruptions. Outcomes typically related to organizations' resilience efforts include addressing customer harm during disruptions and establishing downtime and data loss tolerances.

Is there a defined difference between BC and resilience in your organization?



39.4%

Yes



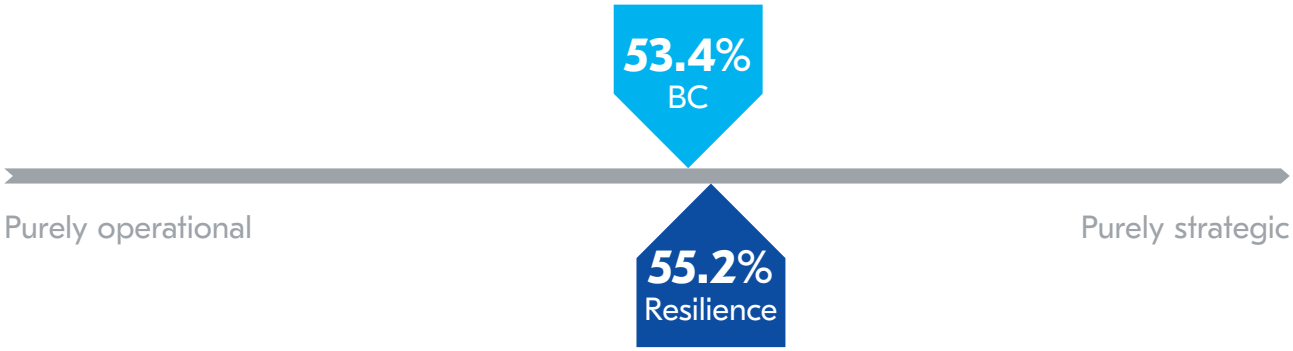
50.0%

No

For the third year running, BC and resilience professionals rate their role as more strategic than operational.

Most practitioners considered their job to be more strategic than operational, and increasingly involve collaboration with senior management. Professionals are now, more than ever, seen as critical contributors and influencers to their organizations' resilience.

On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of BC manager/ head of BC and resilience manager/ head of resilience now lies within your organization?



Three-quarters of organizations are following best practice and ensuring the ultimate responsibility for resilience lies within the c-suite.

The CEO, COO, and CRO typically assume the role of accountable leaders for driving resilience efforts. Some organizations have established a shared responsibility system within the c-suite.



26.4%
Chief executive officer (CEO)



12.9%
Chief operations officer (COO)



12.9%
Chief risk officer (CRO)



6.8%
This responsibility is shared

The presence of dedicated resilience functions is increasing: this is a positive trend that is likely to become more common.

One in four organizations currently have dedicated resilience teams. The rise of such teams demonstrates a growing commitment to resilience within organizations.

Which part of the organization is responsible for the implementation of resilience programmes within your organization?



27.1%
BC



17.7%
A team dedicated to organizational/business resilience



7.1%
A team dedicated to operational resilience

As hybrid/remote working becomes the norm, organizations have yet to fully consider the resilience of infrastructure, people, and processes within remote environments.

More than 30% of organizations surveyed indicated that "all staff" anticipate the flexibility to work from home for a portion of their time. Although 66.8% of respondents stated that the same resilience standards apply to both remote/hybrid and on-premises workers, a notable minority have yet to address it.

Are the same standards of resilience, such as power or communications, being applied to remote workers as well as on premises workers?



8.8%
Yes, and this has been the case for 10 years or more



51.1%
Yes, and this was introduced before the COVID-19 pandemic but more recently than 10 years ago



37.0%
Yes, and this was introduced during the COVID-19 pandemic

In 2023, people skills are the most desirable qualities sought after in BC and resilience roles.

The spotlight is now on people skills that prioritise being process-oriented, adept at planning, capable of driving action, and demonstrating empathy. The emphasis on these attributes highlights how professionals need to not only be able navigate the technical aspects of BC and resilience, but also effectively collaborate, lead, and understand the human dynamics involved.

Please choose the TOP 5 most important attributes you feel are important for a **BC manager** in 2023.



93.0%
Process orientated



91.4%
A good planner



90.5%
High level of professional qualification



89.5%
Empathetic



88.5%
Makes things happen

Please choose the TOP 5 most important attributes you feel are important for a **resilience manager** in 2023.



83.5%
Process orientated



79.0%
A good planner



76.8%
Makes things happen



76.4%
Relationship builder



74.6%
Empowering

Technology is becoming an enabler in transforming BC/resilience planning and processes.

Most organizations are using some kind of technology to ensure resilience, but many are still reluctant to move from manual, tried and tested processes. In-house and "other" solutions were primarily internally developed SharePoint and/or spreadsheet options.

What technology/software do you use in your organization for BC/resilience planning and/or administration within your organization?



37.7%
Emergency notification software



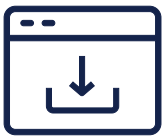
34.4%
In-house developed solution



32.1%
BC planning software (software as a service solution)



15.4%
Risk mapping software



8.4%
BC planning software (installed)



2.3%
Virtual reality applications



0.9%
Augmented reality applications

BC and/or resilience programmes are now receiving increased resource and financial support as a result of an appreciation of the importance of resilience by senior management.

Over a third of organizations observed an increased support for BC and resilience within their organizations which has resulted in an increase in resource and financial allocation to help strengthen those programmes.

In recent years, have you seen increased support for BC and resilience within your organization?



36.1%
Yes, from a financial and resource perspective



25.1%
Yes, but from a resource perspective only



5.5%
Yes, but from a financial perspective only

Looking ahead, practitioners believe that more importance will be placed on cross-team collaboration, senior management attention will increase, training and exercising of plans will become more frequent, and the subjects of operational resilience and organizational resilience will become an increasing part of practitioner responsibilities.

Most organizations are using some kind of technology to ensure resilience, but many are still reluctant to move from manual, tried and tested processes. In-house and "other" solutions were primarily internally developed SharePoint and/or spreadsheet options.

Considering the different aspects of BC and resilience, please indicate how you see the importance of these aspects changing over the next five years:



85.9%
Cross-team collaboration



84.0%
Senior management attention to BC and resilience



83.8%
Training and exercising of plans



81.5%
Operational resilience



79.7%
Organizational resilience



77.5%
Board level support of BC/resilience processes

Overview

COVID-19 brought about significant changes to the BC and resilience industry, with most organizations putting new plans and procedures in place to ensure that their organizations can cope with crises of similar longevity and impact to the pandemic. However, organizations today are already facing new incidents, regulations, and societal pressures that further challenge the effectiveness of their continuity and resilience programmes.

As many organizations continue to grapple with the effects of economic pressures, they are seeing reduced revenues, budget cuts, and resource constraints. High inflation is also seeing organizations affected by increased operating expenses, higher employee turnover, and difficulties in attracting and retaining talent. This poses challenges in maintaining business operations and implementing resilience strategies amid financial pressures. Higher borrowing costs can strain financial resources and hinder strategic initiatives, making it crucial to reassess risk exposures and financial resilience strategies.

The return of war to Europe, as seen in the conflict in Ukraine, and the polarising positions of geopolitical and economic powers pose significant risks to global stability. Organizations operating in affected regions may face disruptions to supply chains, trade restrictions, and increased political uncertainties that demand enhanced resilience planning and risk mitigation measures.

Climate change has resulted in an uptick in extreme weather events such as floods, droughts, hurricanes, and wildfires. These events can disrupt operations, damage infrastructure, and threaten employee safety. Organizations must incorporate climate-related risks into their continuity and resilience planning, both on a short and long-term perspective, to ensure that they are fully prepared for these risks and have an appropriate response plan in place.

Organizations today face a diverse range of challenges that require a comprehensive approach to continuity and resilience planning. By adapting to new risks, optimising resources, and fostering collaboration, organizations can enhance their ability to navigate the complexities and thrive in an ever-changing environment. In this post-pandemic era, organizations need to develop agile and robust strategies.



BC vs resilience





BC moves further into the strategic domain as resilience comes to the fore.

- **There is an increased momentum to differentiate between BC and resilience within organizations:** 40% of organizations now define clear differences between the two functions.
- **The differentiation of BC and resilience roles is still yet to be defined:** clear definitions of roles and functions have not yet been defined in half of organizations surveyed. The "rebadging" of BC manager to resilience manager is still rife.
- **According to respondents, the primary outcomes of BC are still the traditional ones:** these are minimising internal impact when a disruption occurs and creating plans to respond to and recover from disruptions.

In today's dynamic and interconnected operating environment, organizations face challenges that can disrupt their operations and threaten their survival. Whether it is a natural disaster, a cyber attack, supply chain disruptions, or another unforeseen event, the ability to navigate through such disruptions and maintain essential functions is crucial. This is why resilience and BC have come more to the fore in the post-COVID years.

Resilience refers to an organization's proactive ability to withstand, protect, recover, and adapt to a wide range of challenges, disruptions, and changes. Resilience is a broad concept that extends beyond specific incidents or disruptions and concentrates on an organization's ability to create opportunities and thrive amidst risks and uncertainty. Resilience is a proactive and comprehensive approach that involves developing organizational capabilities, fostering a culture of adaptability and innovation, and possessing the agility to respond to both expected and unexpected events. Achieving resilience requires good strategic planning, effective risk management, robust governance, and the ability to navigate through various challenges and uncertainties. Furthermore, it needs to be integrated into an organization's culture, processes, and decision-making frameworks.

BC is a specific component of resilience. BC refers to the process of planning and implementing measures to ensure the continuous operation and rapid recovery of an organization in the face of disruptive incidents. BC enables organizations to continue their key operations, deliver products and services, and fulfil customer commitments, even amid adverse events. It acknowledges that disruptions are inevitable but emphasises the importance of effective planning and preparation in reducing their impact.

Despite the aforementioned differences, and the fact that most professionals interviewed agreed with the view that BC and resilience are different, not all organizations' policies and programmes reflect this yet. When asked about this topic, half the respondents indicated that there is not a defined difference between BC and resilience within their organizations. A respondent in Brazil said that they did not see "resilience" becoming part of organizations very soon. Although new regulations were coming in around BC, the same was not the case for resilience. Others discussed how, although BC was still viewed in its traditional sense, it had moved away from being just a "support service".



"We don't have this difference between BC and resilience in the company. We treat everything as BC."

Enterprise risk and business continuity senior manager, health insurance sector, Brazil

"Other organizations in the region have got BC and resilience together. There is a new regulation in the sector here in Brazil for BC plans and processes to be put in place. However, as I understand it, insurance companies have only done this due to the regulation."

Enterprise risk and business continuity senior manager, health insurance sector, Brazil

"A misconception is that BC needs to sit in the business, a support service."

IT governance and risk manager, gaming & hospitality sector, South Africa

However, an increased number of organizations now have separate BC and resilience functions, with almost 40% of respondents reporting a defined difference between BC and resilience in their own organization. Asia stands out as the region with the highest number of organizations (57.1%) reporting a defined difference between BC and resilience. Meanwhile, Latin America and the Caribbean has the lowest number of organizations defining differences between BC and resilience. Here only 28.0% of organizations differentiate between the two areas.

"There is a difference between BC and resilience. With BC, we are just updating BIAs and BCPs. The resilience aspect comes in when I have tested those plans. Once the plans have been tested and we know that you can bounce back from whatever disruption within the [recovery time objectives], that's when we become resilient."

"Resiliency for me is how quickly we bounce back from a disruption. I pick the priority critical areas and we do those tests. To build resiliency, we test them and improve on what we've done in the last test to ensure that the RTO is getting reduced at each time we are practicing this activity. Therefore, I say there's a difference between BC and resilience. I even changed the policy: when I got here, I called it the BCM resilience policy. When I updated the policy, I took out the word resilience out and I just call it BC policy until we are comfortable we are resilient as discussed with my CIO to my report."

IT governance and risk manager,
gaming & hospitality sector,
South Africa





"BC is traditionally about risk assessments, business impact analysis, appropriate strategies, plans including incident response, continuity, crisis management, crisis communication, awareness and ttx exercises. Typically BC will focus heavily on critical functions, part of which is to support recovery prioritisation, to limit systemic effect on the industry. Resilience, in approach, perhaps is more a holistic approach to managing the enterprise, ensuring the company and what's critical to it can bounce back as quickly as possible."

Head of resilience,
professional services, Asia

"Resilience and BC: one's internal, one's external, that's how we think of it. One's how we do it ourselves and the other one is how we work with partners to ensure that we can maintain our resilience and they can also maintain theirs."

Police inspector - business continuity & operational resilience, public sector, UK

An interviewee discussed how they had rebadged "BC" to "resilience" in their organization as it better reflected the current working environment and removed the internal negative reputation of BC as being a tick-box exercise. Another described how their role was going to change to "resilience" as part of a concerted organizational effort to bring in all the four teams which were currently under BC into one resilience unit. The final quote in this topic had an alternative approach: they used BC in the traditional format (continuity of operations during a disruption), but if the incident became more serious, than they adopted an approach akin to organizational resilience to ensure all departments were working together to counter the disruption.



"We've been attempting to define the scope of business resilience and recently recognized the need to establish a general resilience state for the company. Achieving transparency on what resilience truly means is crucial as many talk about it without fully understanding it. We are relabelling resilience to integrate it better into the business and emphasise its value-add, as BC had a negative reputation and was often seen as a tick-box exercise. Transitioning to resilience and BC has helped us gain better traction with senior management. However, we still face challenges in getting management to understand the importance of continuity planning and the effort required to create effective plans."

Senior business resilience design lead, logistics sector, Denmark

"My role, BC is likely to be changed to resilience. It will all be drawn into a single umbrella rather than seeing it as separate teams. At the moment, I've got four different teams that work for me to provide that, and I really want to integrate those teams and have more cross team working. By doing this, I think that actually it's better because resilience also helps in relation to the major incident emergency preparedness as it's about being resilient under those circumstances as well."

Police inspector - business continuity & operational resilience, public sector, UK

"Business continuity ensures that we have processes and people in place to ensure we continue working through a business disruption as much as possible. If business as usual gets more disruptive than anticipated, then looking at the prioritized activities across the organisation and how they connect as well for organisational resilience. That is looking at all the multi disciplines that are looking at resilience from their specialty lens, whether they specify its resilience or not. Therefore, continuing resilience for the organisation through our specific disciplines, and also having more robust connections across the organization."

Business continuity specialist, healthcare sector, New Zealand



Figure 1. Is there a defined difference between BC and resilience in your organization?

Respondents were asked what the main outcomes of BC were within their organizations (figure 2). Interestingly, the responses painted a graph of two halves: the top half centred around the more traditional aspects of BC and the internal side of the response, whereas the bottom half of the graph focused more on the external side of disruption and coordination of internal departments to produce a cohesive response to an event — aspects which both lend themselves to operational and organizational resilience.

As such, the three top answers to this question were exercising and testing response and recovery strategies; creating plans to respond to and recover from disruptions; and minimising internal impact when faced with a disruption. All three of these activities could be classified as the traditional outcomes of BC. Meanwhile, the bottom half of the graph is focused on addressing customer harm when a disruption occurs, planning for the disruption to products and services (and/or business services) and establishing downtime and data loss tolerances.

"I take on the definition of organizational resilience that considers the outcome on the customer, third party or the community. We also of course want to mitigate reputational damage as well because we have a high standing in the community across the country. There's the connection we need to improve upon business continuity response/ working through a disruption during an emergency response".

Business continuity specialist, healthcare sector, New Zealand

Top three outcomes of BC

85.0%
Minimising internal impact when faced with a disruption

82.6%
Creating plans to respond to and recover from disruptions

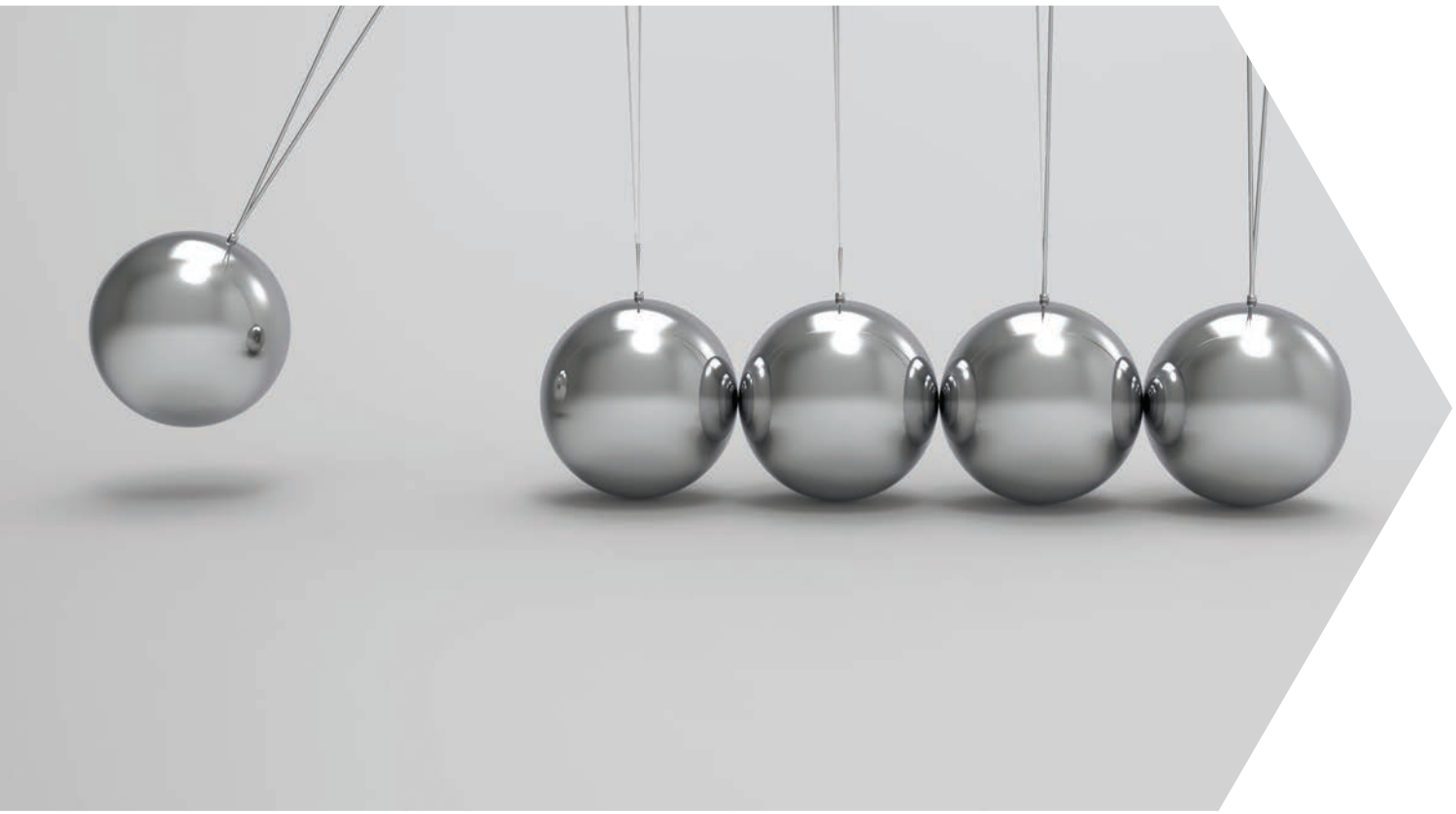
78.4%
Exercising and testing response and recovery strategies

Bottom three outcomes of BC

53.3%
Addressing customer harm when you're disrupted

48.1%
Assessing and mitigating the effects of supply chain disruption

47.7%
Taking into account the likelihood of disruption when making decisions on investment in continuity measures



Which of the following are outcomes of BC in your organization?

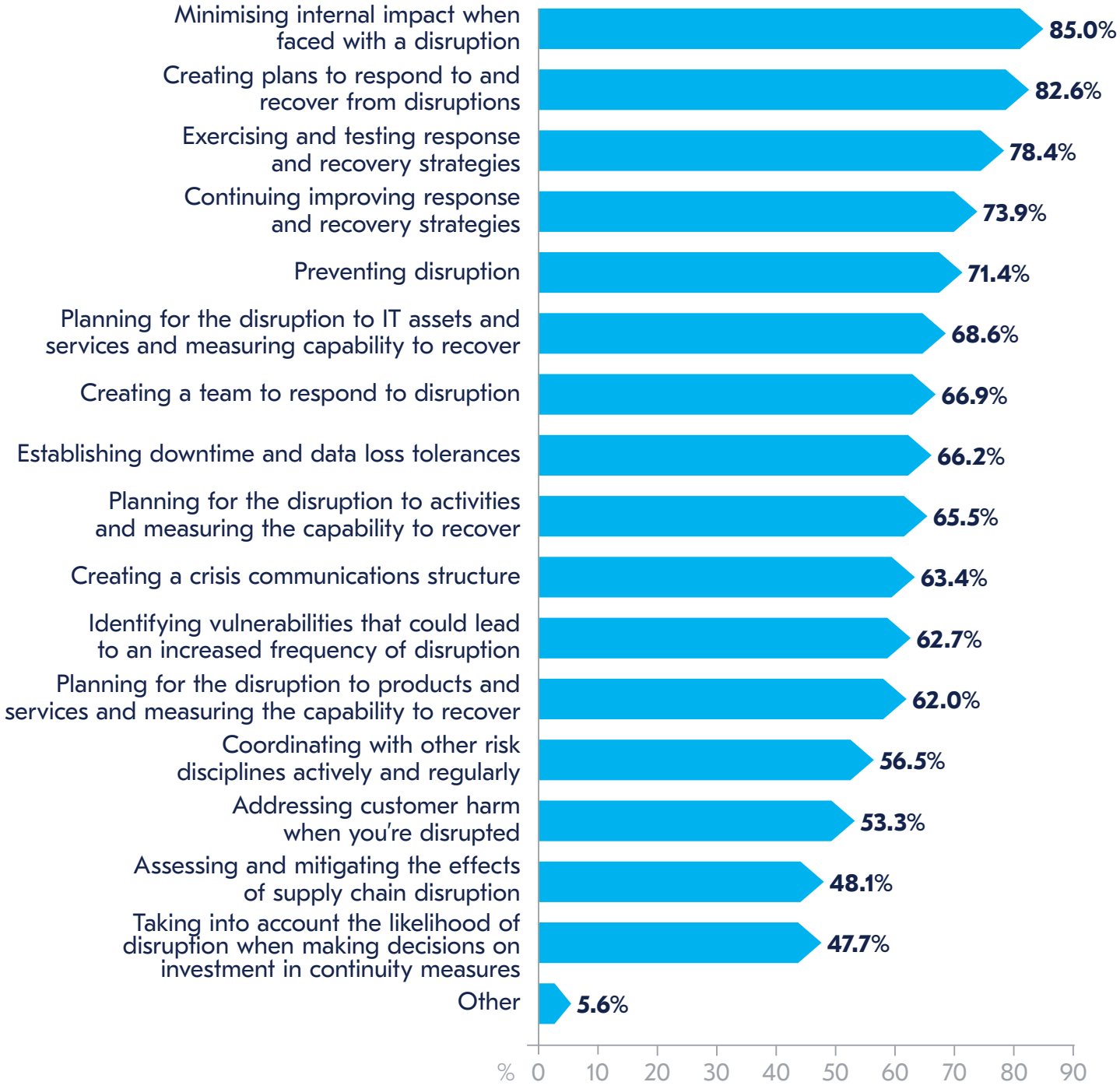


Figure 2. Which of the following are outcomes of BC in your organization?

Nevertheless, it should be highlighted that just two of the options received scores below 50%. This can be partly explained by the earlier finding that half of organizations have not yet established defined differences between BC and resilience. It demonstrates that some activities which would come under the remit of "resilience" in some organizations are still being delivered by BC teams in a large number of cases. This can be a pain point for professionals as they are expected to take on more responsibilities, with little or no increase in remuneration or team size.

BC: more strategic or more operational?





BC: more strategic or more operational?

- **Practitioners continue to perceive BC to be more strategic than operational:** practitioners continue to see the role of BC as marginally more strategic than operational, but the figure remains relatively unchanged from 2022.
- **Unsurprisingly, the role of the resilience manager is perceived as being more strategic than its BC equivalent:** the rating of a resilience manager when considering if the role is more operational than strategic is, however, just three percentage points higher than 2022.

Although 50% of organizations do not have a defined difference between BC and resilience, the BC role continues to encompass more of the strategic elements of resilience; moving away from having a purely operational facet. The shift towards a more strategic approach by BC/resilience managers has resulted in increased recognition of their value by management teams. BC/resilience professionals are now, more than ever, seen as critical contributors to organizational resilience, enabling businesses to proactively anticipate and respond to emerging challenges. This expanded role enhances the organization's ability to navigate uncertainties, seize opportunities, safeguard its reputation, and ensure its long-term success.

Respondents were asked about where they would place their BC manager/head of BC on a scale of 1-100 where 1 is purely operational and 100 is purely strategic: practitioners considered their job to be marginally more strategic than operational, with an average rating of 53.4 (2022: 53.8). The figure has remained virtually unchanged since the publication of the previous BCI Continuity & Resilience Report 2022.[1]

The neglible decline of 0.4 percentage points in this year's report compared to last could be regarded as a slight stagnation in an industry shift towards resilience. However, the reality is quite the opposite: last year's report did not make a distinction between BC manager/head of BC and resilience manager/head of resilience. If both scores are combined from the two questions, the 2023 score would be 54.3. This actually represents a 0.5-point increase year-on-year.

On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of BC manager/ head of BC now lies within your organization?

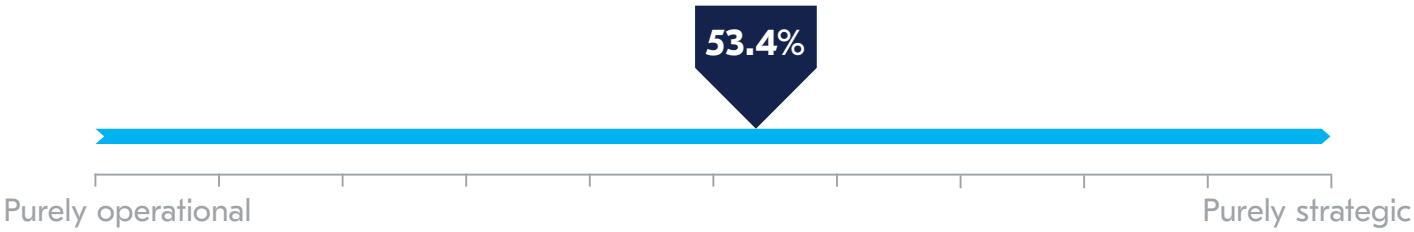


Figure 3. On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of BC manager/ head of BC now lies within your organization?

As mentioned in the previous paragraph, respondents were also asked where they would place their resilience manager/head of resilience with the same linear logic (1 is purely operational and 100 is purely strategic). With an average score of 55.2, more than half of practitioners see the role to be more strategic than BC, but the results show there is only a 1.8 point difference when comparing the level of strategic responsibilities of BC vs resilience managers. A likely reason for this is because many BC managers are now seeing resilience as an intrinsic part of their role, so the difference between BC and resilience roles has become much smaller.

Resilience managers are normally expected to focus not only on internal factors, but also seek to ensure that their organization can anticipate, adapt, and thrive in the face of various threats and disruptions while causing minimal harm to customers and other stakeholders. This is now increasingly part of the role of BC managers too and it is clear that the defined differences still have yet to be established in most organizations or, in some cases, will remain as 'resilience' or 'BC' and encompass the same elements, regardless of title. Indeed, an interviewee from South Africa perceived that BC was actually *more* strategic than resilience. This was perhaps as this particular person carried out all BC and resilience activities on his own, and therefore had to take a resilient approach due to having multiple responsibilities. An interviewee from the United Arab Emirates, however, believed that BC and resilience were both strategic disciplines and, at least in this organization, were both managed together to achieve a resilient outcome.

"I think that BC is more strategic than resilience. I play an equal role from a strategic point of view in setting strategy, driving the program of work. I also play a role in the operational space in ensuring it's implemented, embedded, and tested within the units as well. It's me as one person, driving from strategic, to tactical, to operational, I'm playing across all three levels."

"I think that BC is more operational and creating resiliency plays in both the strategic and operational space. I play an equal role from a strategic and operational point of view in setting strategy, driving the program of work. I also play a role in the operational space in ensuring it's implemented, embedded, and tested within the properties as well. I am driving the deliverables from strategic, to tactical, to operational, I'm playing across all three levels."

IT governance and risk manager,
gaming & hospitality sector, South Africa

"BC and resilience are both strategic. I don't assign either of them a particular priority. This is because, in my banking industry experience, both organizational resilience and business continuity have equal weight and are managed together."

Banking operations & technology production management,
financial sector, UAE

On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of the resilience manager/ head of resilience now lies within your organization?

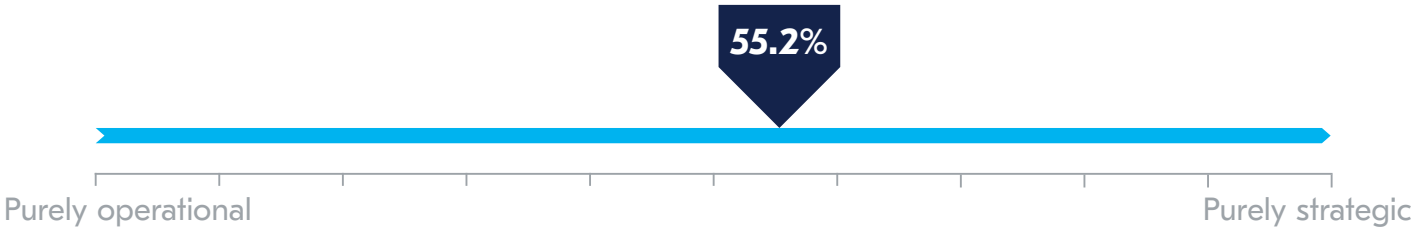


Figure 4. On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of the resilience manager/ head of resilience now lies within your organization?

Evolution of the strategic component of the role of the BC/resilience manager 2020- 2023

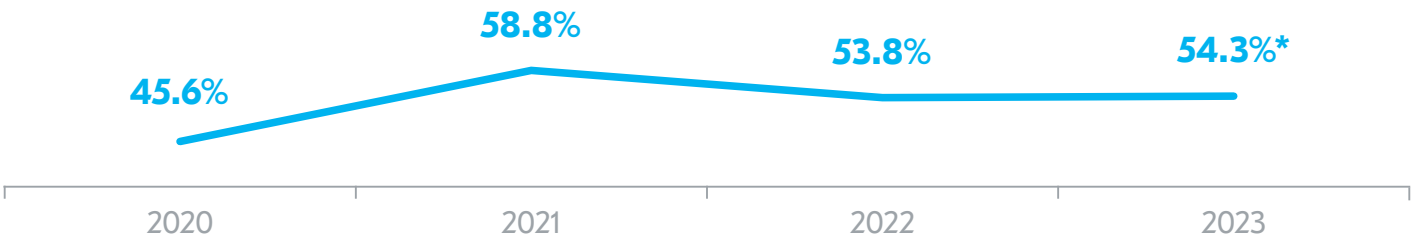


Figure 5. Evolution of the strategic component of the role of the BC/resilience manager 2020- 2023

An interviewee described how their business resilience framework relied on an interplay between the BC and crisis management departments. Historically, crisis management had been operating at a strategic level and BC at an operational level. This created misalignment and the organization built a new strategic layer for both units to fall under. The interviewee further described in detail how the need for a change came about in 2017, and COVID-19's appearance in 2020 further highlighted the issues.

"We are actively striving to be more strategic in our approach. In the past, there was a significant disconnect between crisis management, which was operating effectively at a strategic level, and BC, which was primarily operational and bottom-up. This created challenges during large disruptions, or crises as the two areas did not align. To address this, we introduced a more strategic layer to bridge the gap between crisis management and continuity planning. We are currently working towards achieving full transparency across our 26 areas to ensure that both aspects align effectively in the future."

Senior business resilience design lead, logistics sector, Denmark

"Our BC and crisis management efforts have been in place for a while, but the need for a more integrated approach arose after a cyber attack in 2017 that cost us a substantial amount of money. Before, [we] operated in silos as separate entities, but now we are moving towards a more unified structure. Crisis management was relatively easy to implement as we learned by doing, supported by experienced staff and international standards. However, implementing BC proved more challenging due to staff changes and the need to establish capability throughout the organization. During COVID, BC was pushed from the bottom up, resulting in many templates being filled out, but not necessarily a full understanding of their applicability and usability within the company. Currently, we are on a journey to optimise our BC efforts to achieve the best outcomes."

Senior business resilience design lead, logistics sector, Denmark

* 2023 figure is the average score for BC managers (53.6%) and resilience managers (55.4%).

Meanwhile, a third interviewee described how resilience could only be achieved if the different component parts — all important in their own right — were brought together by senior management. For them, this was currently the gap seen in many organizations. Another interviewee believed that the scope of BC was still largely operational within their organization, but was becoming slowly becoming more strategic, helped by some consolidation in the BIA process. The interviewee went on to explain that BC's remit had expanded to also consider the effect on external stakeholders and was, in effect, practising operational resilience.

"There are gaps between doing BC and then moving to a broader approach of resilience. I think the knowledge or skills are there, it's just that they are separate. I think it's hard for organizations to view all this together under the umbrella of resiliency. Just having somebody who is a BC planner and can conduct BIAs is great. We need that, but we also need people who can write useful disaster recovery procedures. We need people who know how to elicit risks from a group of employees, whether it's department heads or senior management. Bringing all those together, even compliance, is difficult. I think that is the gap. This is why it would be useful to have a board level member in charge of resilience."

Resiliency advisor, United States

"I think at the moment we're more operational than strategic, but it's still early days because we've started off and it's taken quite a long time. We had to streamline our business impact analysis process as it was covering too many processes, making it unwieldy. We narrowed down the focus to essential processes that can't be done without for five days or more. We reduced the number of processes from 350 to about 150. Some less critical processes were excluded from the plan. Now, we are looking to focus more on strategy, such as the project to build a new centre for health and social equity as part of our future plans."

Resilience manager, higher education, United Kingdom

"Our real customers are students, and our emphasis is on delivering their teaching and learning. When disruptions occur, the initial focus is on the impact and disruption to the students. We have the flexibility to deliver most of our teaching somewhere else, or online, in the face of disruption, ensuring minimal impact on students. I'm not sure if this makes us unique or just lucky, but the first consideration is always the disruption to students. It seems we're already practising operational resilience as we're thinking about the effect it has on stakeholders which, in my case, are students. It involves protecting customers, ensuring critical activities like access to money or education are safeguarded. So, we are already implementing operational resilience measures by prioritizing the well-being of our students."

Resilience manager, higher education, United Kingdom

Finally, an interviewee spoke about how the introduction of financial services regulation in operational resilience had helped to make a more defined definition between the two roles in their organization.

"Operational resilience is often misunderstood in the industry, with some confusion about its difference from BC. In the simplest terms, BC looks internally at what matters to the company, while operational resilience looks externally at what matters to the customer. My role involves meeting regulatory requirements for both regulators (financial services and UK operations) and ensuring operational resilience is integrated from the design point to prevent issues. BC and ITDR come into play after operational resilience has failed."

Head of operational resilience, insurance sector, United Kingdom

"BC is a simple and operational process. It's about addressing specific incidents like building losses, system failures, or personnel issues to quickly fix and resume normal operations. It follows a clear path from identifying the problem, to implementing the solution, to getting back to business, and continuing the operations. On the other hand, operational resilience takes a more strategic approach. It involves planning for new implementations or changes that could impact various processes across different areas and countries. When introducing new computer systems or suppliers, we need to consider different levels of resilience, such as two-day recovery, based on their strategic significance."

Head of operational resilience, insurance sector, United Kingdom



Where is the industry now?

Traditionally, BC/resilience managers focused primarily on operational aspects, such as developing plans, conducting risk assessments, and ensuring that critical processes and systems could be restored in the event of a disruption. However, with the emergence of complex and interconnected challenges, the survey results show that practitioners have taken on a more strategic role within organizations.

BC and resilience professionals nowadays actively contribute to strategic planning processes. They provide insights on potential risks, vulnerabilities, and resilience requirements that need to be considered when formulating organizational strategies. By aligning BC efforts with strategic objectives, they help enhance the organization's overall resilience and long-term sustainability.

BC and resilience practitioners have also embraced a proactive approach by conducting horizon scanning and gathering risk intelligence. They monitor emerging risks, technological advancements, geopolitical factors, and other trends that could impact the organization's continuity and resilience. This information is used to inform strategic decision-making, identify opportunities, and implement preventive measures.

BC and resilience managers' roles have expanded to engaging stakeholders at various levels. They work closely with senior management, department heads, and cross-functional teams to understand business objectives, assess critical dependencies, and embed resilience principles into business processes, ending a long-term siloed culture that was historically predominant in most organizations. They also collaborate with external partners, regulators, and industry peers to exchange knowledge, share best practices, and enhance collective resilience.

BC and resilience professionals are also now likely to play a key role in implementing organizational resilience frameworks. They assess the interdependencies between business functions, supply chains, technology systems, and external factors to identify vulnerabilities and design holistic resilience strategies. These frameworks encompass not only the ability to recover from disruptions but also the capacity to adapt, transform, and thrive in the face of evolving challenges.

Many BC and resilience professionals are also seeing increased demand from executive leadership and board-level committees to provide regular updates on risk profiles, resilience measures, and the effectiveness of resilience strategies. By presenting comprehensive information and insights, they help senior leaders make informed decisions and allocate resources strategically.

Different organizations in different geographies and sectors will have diverse corporate structures, complex reporting lines, and different corporate priorities. Legacy policies, structures, and technologies may make it difficult to move to a way of working that promotes resilience in a way that the previous paragraphs describe. For others, BC will have a firm place within an organization which fits into the overall resilience jigsaw, or still has yet to develop into a more strategic element of the business. In healthcare and aviation, for example, BC was considered to be a more operational part of the organization (both rated 45 on the 1-100 operational-strategic line) whereas in consumer goods, where support for BC/resilience is often limited, the score demonstrated just how much BC professionals have to "act up" with a resilience hat on too (65 on the 1-100 operational-strategic line).

Role changes within BC and resilience





Role changes within BC and resilience

- **Job titles and roles are slowly changing to reflect the more strategic approach of the role of the BC/resilience professional:** 41.9% of respondents have had a role change from BC to resilience, or are expecting it to change in the near future. Europe and Asia are the regions with the highest number of roles shifting from BC to resilience in recent years.
- **98% of role title changes have taken place within last five years and 75% within the last 2 years:** this demonstrates that COVID-19 started this change, with more contemporary drivers (such as the implementation of operational resilience regulation in various countries) continuing to ensure resilience remains at the core of organizations.

As the role of the BC/resilience professional evolves to become more involved in the strategic and external facets of resilience, job titles and roles have evolved as well. The survey asked whether BC managers had seen their job title changed to include resilience recently, with 41.9% reporting that it had, or will do in the near future. This data is coherent with the previously described figures that show that half of organizations do not have a defined difference between BC and resilience yet, despite the scope of work being expanded to embrace a more strategic approach.

The regions where job titles are most likely to have changed are those in North America (31.2% report their title has already changed) and Africa (25.0%). In Europe, however, just 15.9% report that their job title has changed to incorporate resilience. Interestingly, the UK and, more recently, the EU have been frontrunners at launching new operational resilience regulation in financial services. Interviews for the *BCI Operational Resilience Report 2023* showed that in regulated banks, BC's place frequently remained firmly in place, working alongside operational resilience professionals to ensure resilience from both an internal and external perspective.

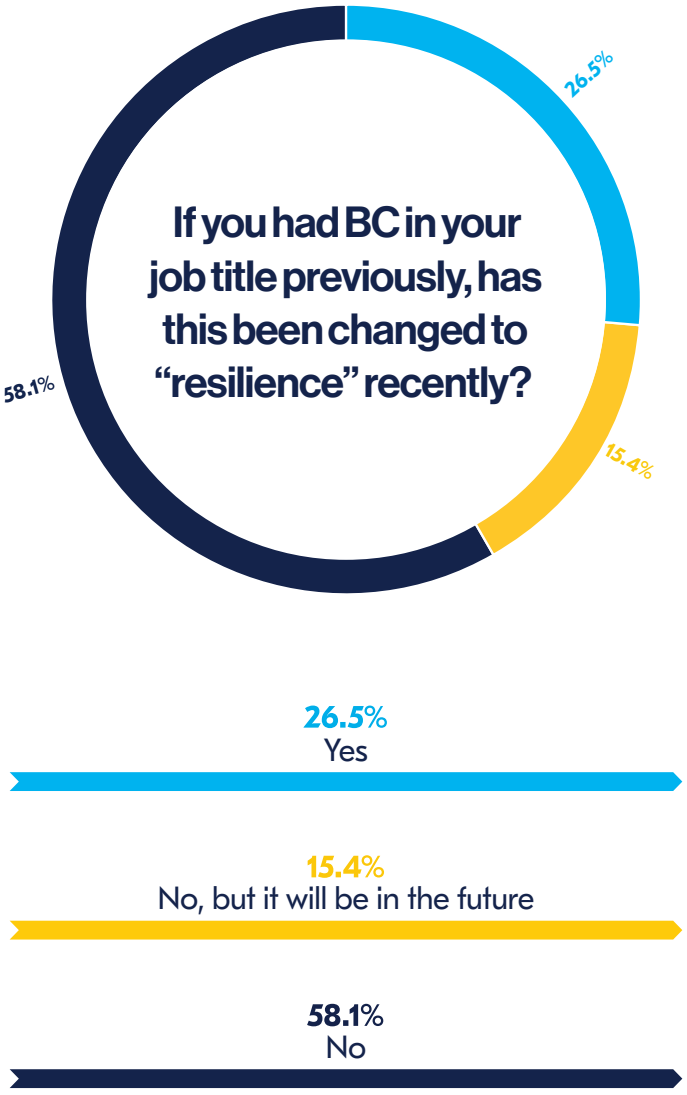
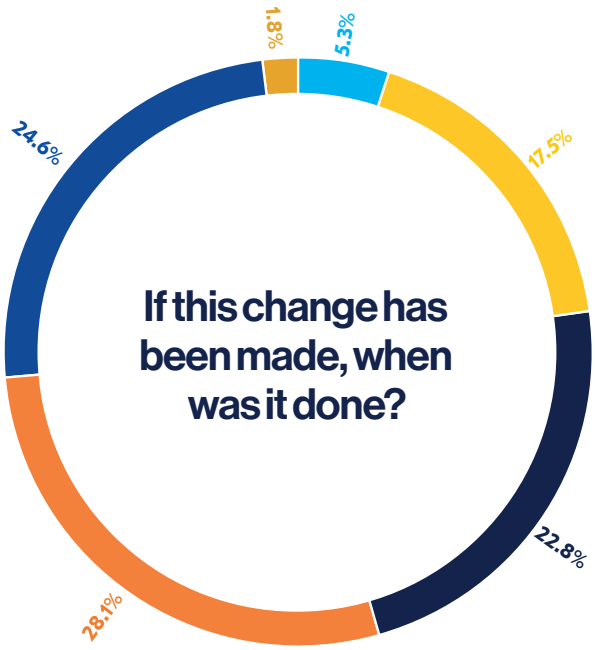


Figure 6. If you had BC in your job title previously, has this been changed to "resilience" recently?

COVID-19 has been recognised as one reason for changes occurring in the resilience industry over the recent years, and it is therefore of little surprise that 98.2% of those whose title has changed have seen it happen within the last five years. However, given three-quarters have changed in the last two years, it suggests new factors are at play, such as the adoption of operational resilience regulation in many industries and geographies. The inclusion of resilience within job titles in the last five years reflects the challenges faced by organizations: an always evolving risk landscape, the need for a holistic approach to risk management, the increased strategic importance of BC, new regulatory requirements, an evolving organizational mindset, and increased expectations from stakeholders — to name but a few. These factors have driven organizations to embrace resilience as a core competency and to seek professionals who can contribute to their resilience goals. Job titles that incorporate resilience indicate that the organization is committed to resilience and instils confidence in its capabilities.





5.3%
In the last three months

17.5%
In the last six months

22.8%
In the last year

28.1%
In the last two years

24.6%
In the last five years

1.8%
Over five years ago

Figure 7. If this change has been made, when was it done?

Respondents were then questioned about the reason for the role title change. As would be expected by the responses discussed thus far, 70.2% of respondents said the change was made to better reflect the wider, strategic, remit of the BC role. This answer attracted nearly double the responses of other options.

Other reasons were to make the role better understood by the whole organization and to promote more cohesive working practices within the organization. Some organizations have rewritten their BC processes and procedures to better reflect the modern working environment and consider that resilience provides a better definition. For others, operational resilience regulations or organizational resilience practices being employed have prompted job title changes. These job titles changes reflect the expanding and ever-more complex working environment for organizations today, and the expectations and demands placed on practitioners to ensure that organizations remain resilient to the changing landscape. An interviewee described how their job title had changed with the introduction of operational resilience regulation but seemed underwhelmed by this as his job title changed so readily anyway.

"My job title was created after the financial regulation, almost 5 years ago, no one had one. A lot of it came from COVID and BCI and the financial crisis. Historically we have changed everybody's job title every six to seven years. When we created this industry we were all ITDR managers, then became contingency managers, then BC planners, then BC managers and now most have changed their title to Operational Resilience managers. We do this every now and then and in the main do much the same work, but it does change in title."

Head of operational resilience, insurance sector, United Kingdom

What was the reason for the role title change?

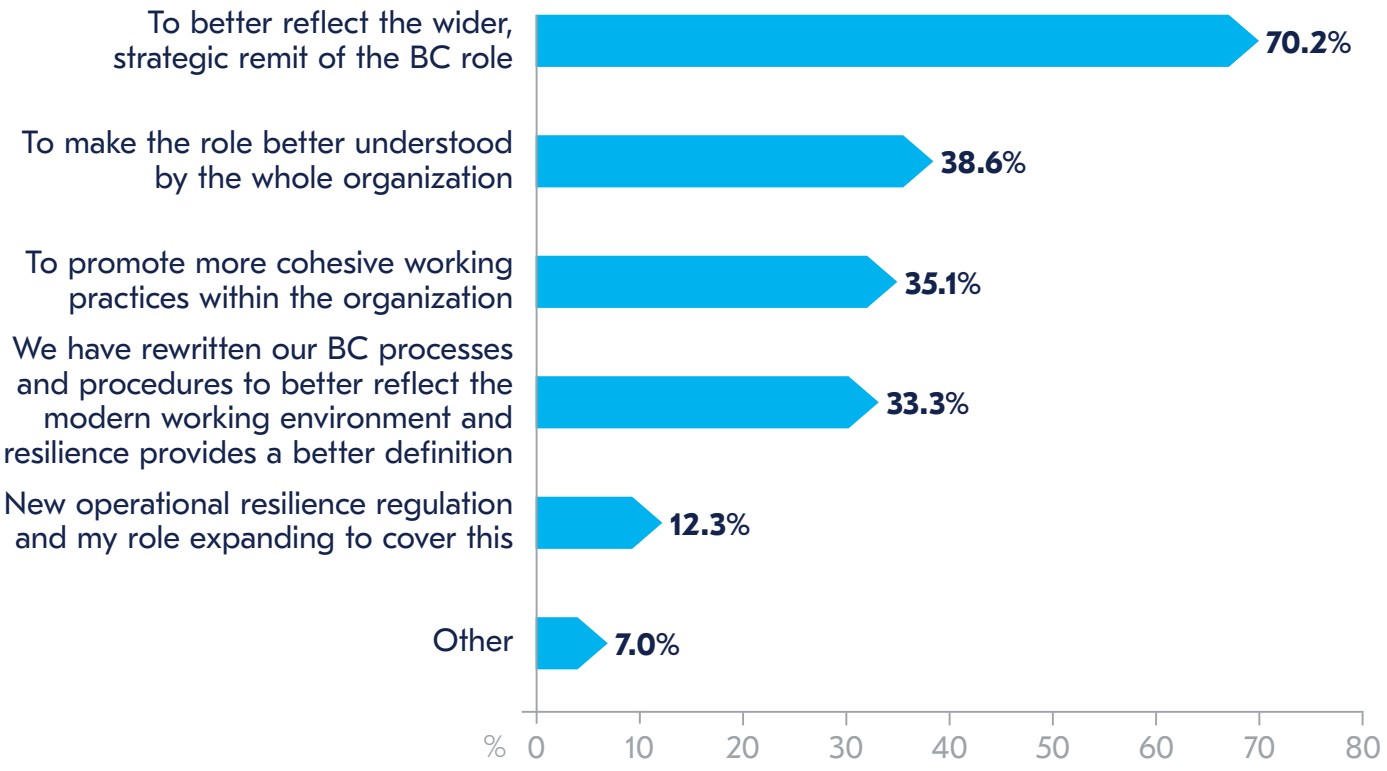


Figure 8. What was the reason for the role title change?



When respondents were asked whether they had any perceived or actual gaps in knowledge or skills as a result of changes to job title and roles, the free-text answers uncovered a range of areas. Some felt that they needed additional training to better understand new technologies, whilst others thought they needed to be better versed on the widening risk landscape. There was a palpable interest to become better versed on long term strategic development, while others felt that they needed more specific training on topics such as operational resilience. Some consultants mentioned that they felt the need for training on the practical application of risk and resilience beyond just continuing services, whereas others felt that they needed a better overview of the organization in order to know how best to apply their skills within different scenarios, ensure information silos are broken down whilst, at the same time, striving to gain senior management support. An interviewee highlighted that his role had changed overnight from "BC" to "business resilience," but without a clear definition of the new role. Although the intention was to ensure the role had a broader scope beyond "just BC," he said that the full definition of resilience had yet to be defined by the organization.

"The job title change from BC Manager to Business Resilience Design Lead happened around a year ago. When I got hired, it was initially for the BC Manager role, but on my first day, they informed me of the change to Business Resilience. The desire was to have a broader scope beyond just BC. The challenge is that while everyone in [this company] talks about resilience and resilient supply chains, there isn't a clear, universally agreed-upon definition of resilience, and that's something we are currently working on. This is a common challenge worldwide, not just within our organization."

Senior business resilience design lead, logistics sector, Denmark



Implementation of resilience programmes





Implementation of resilience programmes

- **A quarter of organizations have either a dedicated team responsible for the implementation of resilience programmes, either through operational or organizational resilience:** However, BC is still cited as the highest single department having responsibility (27.1%), with risk management in third place (16.2%).
- **Nearly half of organizations now have someone within the organization who is responsible for resilience and has a direct reporting line to the board/senior management:** 43.6% of respondents report that they now have someone who is directly responsible for resilience and is either on the board, or has a direct reporting line.
- **This supports an increasing trend where shorter reporting lines are created between the c-suite/senior leadership and those individuals responsible for resilience programmes:** Two years ago, most respondents felt the role of "Head of Resilience" was introduced to ensure this happens. However, now that other board roles are becoming defined as having responsibility for resilience, this need has become somewhat negated.

With an increasingly dynamic and uncertain working environment, awareness of the importance of having a resilience programme in place has grown. Resilience is either managed by a dedicated team or department within an organization or, when no dedicated department is in place, by the BC or risk management department. Indeed, more than a quarter (27.1%) report that the responsibility for resilience lies with BC, ten percentage points more than the second most popular option, which was an organizational/business resilience function (17.1%). Rounding off the top three is risk management, with 16.2% of responses.

All these functions play a vital role in identifying and assessing potential risks and vulnerabilities, developing strategies to mitigate them, and ensuring that the organization remains able to bounce back swiftly from disruptions. With ultimate oversight from senior management, BC/resilience managers work closely with key stakeholders across different departments, including finance, operations, IT, and human resources, to embed resilience into the organization's culture and operations.

Which part of the organization is responsible for the implementation of resilience programmes within your organization?



Figure 9. Which part of the organization is responsible for the implementation of resilience programmes within your organization?

While some detail other departments as responsible, the comments in the "other" category are largely made up of those respondents who report that "multiple" departments within the organization are responsible for implementation of resilience programmes or, in fewer cases, the senior management itself.

The relationship between the c-suite/senior leadership team and the team responsible for running the organizations' resilience programme is pivotal in fostering a culture of resilience and ensuring effective implementation of these programmes. The c-suite/senior leadership team holds the ultimate responsibility for the organization's overall strategy, risk management, and decision-making. The team in charge of the implementation of resilience programmes serves as a key liaison between the c-suite and the operational teams. They collaborate closely with the c-suite to align resilience initiatives with the organization's strategic objectives and risk appetite. By providing regular updates, insights, and recommendations, they enable the c-suite to make informed decisions regarding resource allocation, prioritisation, and the integration of resilience into business operations. This partnership ensures that resilience programmes receive the necessary support, visibility, and engagement from top-level executives, leading to a comprehensive and proactive approach to resilience.

In order to better understand this relationship, respondents were asked whether they have a dedicated person who is responsible for overseeing the running of a resilience programme within their organization that reports directly to the board. 43.6% of respondents say they do have such a person, equating to a significant increase of 21.8% year-on-year. Previous *BCI Continuity & Resilience* reports showed a palpable frustration amongst respondents that such a person did not exist, meaning that it was difficult to get support and buy-in for BC and/or resilience programmes.

It appears that, now organizations have established their "new normal" post-COVID, they are now ramping up efforts to ensure their organizations are better prepared for future major incidents.



Figure 10. Do you have a dedicated person who is responsible for overseeing the running of a resilience programme within the organization and reports directly into the board?

The theory that resilience has now become better embedded after learnings from COVID-19 and other factors such as the introduction of operational resilience regulation is also evident in the bellow graph where six in ten respondents (60.1%) reporting that the hiring of someone dedicated to running the resilience programme had occurred within the last five years, with most being appointed within the last two years (32.5%). This represents a near six percentage point increase on last year demonstrating that a significant number have been appointed over the past year which points towards operational resilience regulation being a major driving force.

If you already have such a person within your organization, how long ago was this role created?

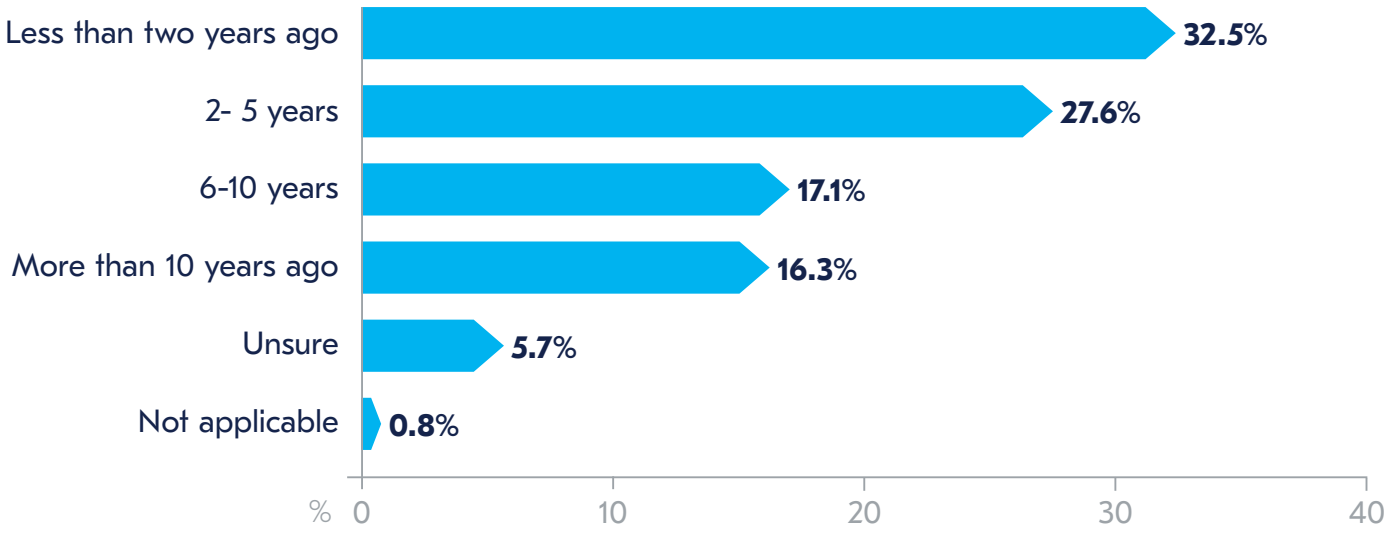


Figure 11. If you already have such a person within your organization, how long ago was this role created?

This shift towards shorter reporting lines is being driven in part by the recognition of the critical role that resilience plays in the success and sustainability of businesses, as well as the requirement amongst some to adhere to new regulations. Respondents are noting shorter and more defined reporting lines to the c-suite, something particularly obvious in financial services where new operational resilience regulation has or will be implemented in geographies such as the UK, the EU, Malaysia, Singapore, Canada, Ireland, Australia, New Zealand, and South Africa.

By reducing the layers of hierarchy, organizations can streamline communication, enhance decision-making, and improve the agility of their resilience efforts. Shorter reporting lines allow for direct and frequent interaction between top-level executives and those overseeing resilience programmes, fostering a deeper understanding of the organization's risk landscape and a more rapid response to emerging threats. Ultimately, the emphasis on shorter reporting lines reflects the increasing recognition of resilience as a strategic imperative and ensures that it receives the necessary attention and support from the c-suite/senior leadership team to drive organizational success.

Whilst there is a clear appetite for a defined person/department responsible for implementation, the same question was asked at a board level. Respondents were asked their opinion on establishing a board-level appointment with the responsibility for building, overseeing, and ensuring compliance at all levels in the organization. While nearly a third (32.1%) of respondents said that they already had such a position within their organization, this is a drop of 5.2 percentage points year-on-year, almost matching pre-pandemic levels. Interestingly, at the peak of COVID-19 in 2020, this figure jumped to 55.3% which was, almost certainly, the result of temporary roles being created to manage the crisis. A similar downward trend is evident in the number who report a desirability to get the role created within their organization.



This data can be explained by the aforementioned trend of reconfiguration of roles and responsibilities within the industry. While the appointment of chief resilience officers gained momentum during the past five years, a noticeable shift in organizational priorities has now happened, with existing roles better defined to address resilience priorities. The current evolving landscape reflects the recognition that resilience is not necessarily limited to a single role, but requires collective effort and cultural transformation throughout the organization.



37.0%
I would like this role to be created, but it will be difficult to get support for it in my organization

32.1%
We already have such a person in our organization

11.3%
My organization is too small to warrant the creation of this role

7.6%
There is no need for this within my organization

1.9%
Not applicable

10.2%
Other

Figure 12. What is your opinion of establishing a board level appointment who is responsible for assessing resilience at all levels and ensuring all resilience building efforts within the organizations are aligned and coordinated?

Ultimate ownership of resilience





Ultimate ownership of resilience

- **Ultimate ownership of resilience lies within the c-suite/senior leadership team in two-thirds of organizations:** the CEO, COO, and CRO (or their equivalent in smaller organizations) normally assume responsibility for resilience. Others have established a shared responsibility system within the c-suite.
- **Very few organizations have a chief resilience officer at board level:** the "head of resilience" role, however, is seeing a growing presence in organizations.

The implementation of resilience programmes, guided by top-level leadership, plays a crucial role in ensuring buy-in from staff at all levels in an organization. According to our survey, this is indeed the case with 67.8% of organizations reporting that a board member is ultimately accountable for the resilience programme. More than a quarter (26.5%) place the CEO as the figure that holds ultimate accountability for resilience. This makes sense as the CEO is the ultimate decision-maker and visionary in an organization; and plays a pivotal role in setting the tone for resilience across the organization. In an ideal situation, the CEO can champion resilience as a strategic imperative, ensuring that it is embedded in the organization's mission, values, and long-term goals. This figure has, however, decreased from 39.5% in 2022, as COOs and CROs now take this responsibility in more organizations, driven in part by new operational resilience regulations.

An interviewee disclosed how, while the reporting line to the board was close, with BC being the responsibility of the CEO, he also had regular interviews with the executive management team to ensure they could feedback suggestions on what should be included in the organization's BC plans; and he could share his own ideas to the board. Having the ability to have regular conversations with senior management is as important as having a close reporting line.

Meanwhile, an interviewee in South Africa said that their role had recently moved to come under the chief strategy officer. They were hoping this would be the push required to ensure that their job moved towards a broader focus on resilience.

"To add on, before the year ends, I have interviews with the executive management teams, directors, CEO, COO, and the CFO. So, I will get inputs on what they would like to see occur in BCM space for the next year. Therefore, it's not done in isolation of not having those meetings with top management. I wanted to stress that they do have an input on it. The CIO reports to the CEO. BCM is represented at the board via the CEO."

IT governance and risk manager, gaming & hospitality sector, South Africa

"Previously, the role was situated in campus services, but now it falls under governance services in the vice chancellor's office and comes under the chief strategy officer. This shift might lead to a broader focus on overall resilience."

Resilience manager, higher education, United Kingdom

COOs are the responsible figure for resilience in 12.9% of organizations, a slight increase of one percentage point year-on-year. COOs often assume a significant role in overseeing the implementation of resilience initiatives within organizations. Their operational expertise and understanding of core business processes position them well to drive resilience efforts. In areas where operational resilience regulation has been brought in, it is sometimes stated that the COO (or the chief operations senior management function - SMF24 - in the UK; which may be a split role) must be in charge.

The role of the CRO is now accountable for resilience in 12.9% of organizations, an increase of six percentage points year-on-year. The standard duties of the CRO are the identification, assessment, and management of risks across the organization, as well as helping to nurture a risk-aware culture and ensuring that risk management is embedded into strategic decision-making. By aligning risk management practices with resilience objectives, the CRO plays a critical role in strengthening the organization's ability to anticipate and respond to disruptions. For financial institutions — whether regulated or not — the CRO is the most popular choice, with 27.1% of respondents from this sector saying that the CRO is the person in charge.



26.5% Chief executive officer (CEO)

12.9% Chief operations officer (COO)

12.9% Chief risk officer (CRO)

6.8% This responsibility is shared

3.8% Chief financial officer (CFO)

3.4% Head of resilience

3.0% Chief information officer (CIO)

3.0% Other board level role

3.0% Head of BC

2.7% Chief technology officer (CTO)

2.7% Chief information security officer (CIRO)

2.7% Head of risk

1.9% Head of operations

1.1% Head of IT/ cyber security

0.8% Chief resilience officer

12.9% Other

For 6.8% of organizations, the implementation of resilience is a shared responsibility within the c-suite. Implementing resilience programmes from the top down requires a collaborative effort among c-suite executives, each contributing their expertise and leadership to the organization's overall resilience strategy. For regulated organizations in the UK, the SMF24 role (which is the board function having responsibility for all the internal operations and technology of an organization) is the only board role which can be split amongst up to three board members. This factor could be another reason why a minority of respondents note shared responsibility.

Despite the decline in interest in the role of a chief resilience officer, it should be noted that 0.8% of respondents *do* say they have such a role in charge in their organization — an increase from zero in 2022.

Figure 13. Who holds ultimate accountability for resilience within your organization?

The contemporary BC and resilience manager





The contemporary BC and resilience manager

- **In 2023, people skills are seen as the most important part of a BC/resilience manager's toolkit:** interpersonal skills, emotional intelligence, and empathy are believed to be more crucial than having a vast technical knowledge of the sector.
- **However, traditional skills in a BC manager's toolkit remain important:** being process-oriented and possessing good planning skills are still considered important attributes.
- **The need for greater interpersonal skills demonstrates how engagement between BC and the rest of the business is crucial for the resilience of an organization:** BC/resilience managers need to upsell the importance of resilience to top level management and are now being regarding as a trusted advisor to the board in some organizations.

To effectively implement a BC and/or resilience programme, managers may need to adapt their personal attributes to align new remote or hybrid environments. Whereas BC was formerly more reactive than proactive, professionals in 2023 are now being involved in strategic decisions about long term risk, are finding themselves at the centre of the resilience jigsaw, and are having to adapt their processes and procedures quickly and effectively to cope with the fast pace of organizational chance. When BC was primarily an operational role, managers focused on creating reliable plans and conducting business impact analyses (BIAs), with senior executives and/or the c-suite only offering minimal engagement with the process. However, with the fast pace of organizational change, roles now increasingly include a strategic remit, as discussed in section two of this report.

For "new" BC and resilience managers, people skills are a key part of a successful resilience programme. BC/resilience managers have always had a better oversight than most about the organizational structure of their businesses due to the BIA process, the requirement to have "BC champions" across the organization, as well as an oversight of risk. These attributes are now being extended in building relationships with various departments to foster a resilient culture throughout the organization. BC and resilience managers need to be proactive in establishing connections and collaborating with others to ensure the successful implementation of resilience initiatives. Additionally, they should possess the ability to focus on processes, think quickly, and adapt swiftly in their work as the contemporary business landscape demands agility in responding to disruptions.

"I think the most important attribute for a BC manager is good communication and relationship building skills. You must also be analytical and be able to ask the right questions. Good decision-making is important too, sometimes your managers are looking to you because you've been on their ground. For example, they may ask: what is the best way forward? How do we do this?"

IT governance and risk manager, gaming & hospitality sector, South Africa

Likewise, it is crucial for BC/resilience managers to establish a close reporting line with the c-suite. They should strive to become a trusted partner in decision-making processes rather than be seen as an operational function which, as one respondent put it, is "only wheeled out when a crisis happens." By cultivating a strong relationship with senior executives, the BC/resilience manager can effectively contribute to strategic discussions and influence the organization's resilience agenda.

Respondents were asked to choose the top five most important attributes they feel are most important for a BC manager and for a resilience manager. A BC manager focuses specifically on ensuring the ongoing availability of critical business functions and processes during and after disruptions. While some are now moving to consider external factors (such as customer impact or shareholder impact) for most, the focus still remains around internal business functions and processes.

The top five skills for BC managers chosen by respondents are: being process orientated (93%); a good planner (91.4%); having a high level of professional qualification (90.4%); being empathetic (89.5%); and the ability to make things happen (88.5%). It is of note that the appreciation of the importance of having a high level of professional qualification has moved from the lower half of the table to third place this year. This suggests that organizations are being more discerning when recruiting for new roles; some may have struggled to keep operations running effectively during COVID-19, for example, and now want to ensure that any new staff recruited possess the necessary professional skills to make a difference from the beginning. Having a high level of professional qualification also results in higher levels of pay, so is of benefit to both parties. In this year's 2023 Global BCM Compensation Report, produced in partnership with the BCI, those with an MBCI qualification could expect an average compensation level of $148,303 whereas the figure for those who were only considering certification was $103,468[2]. To support this further, an interviewee described how professional qualifications were more important than academic qualifications to be an effective BC manager.

"If you do not have an undergraduate degree or a postgraduate degree, I think you can still execute BC. However, doing the BCI exams, going through that ISO, or reading the Good Practice Guidelines and then taking the CBCI the exam is essential. I feel it gives you that foundation to execute, because no number of undergraduate degrees will give you an overview of the knowledge or theory of what we get from the BCI certification."

IT governance and risk manager,
gaming & hospitality sector, South Africa

"I think professional qualifications are good as it helps to focus the mind and puts a process in place and plan how you'd implement that. Doing the CBCI exam and all the training around it helped me to contextualise everything and put it into the right place so that I was able to deliver a plan but with logic and due process."

Police inspector - business continuity &
operational resilience, public sector, UK

Other attributes, which were at the top in 2022 and have seen a fall in 2023, were "communicator", "relationship builder", and "collaborator". However, these attributes were still very popular with respondents, with "relationship builder" appealing to 88.2% of respondents, "communicator" to 86.8%, and "collaborator" attracting 84.8% of responses. This change could be attributed to the fact that the challenges faced by organizations today need to retain a strong operational focus (e.g., the internal disruption caused by a cyber attack, or the internal issues that need to be addressed in the wake of supply chain disruption).

"The topmost important attributes I feel are the most important for BC managers, being a credible, sincere, long term relationship builder, thick skinned, tenacious, good sense of humour!!, good personal survival instincts."

Head of resilience,
professional services, Asia

"For both BC and resilience managers, being a persuasive communicator is crucial. Internal promotion and selling the benefits of BC or resilience are essential to gain support. In BC, good planning and the ability to make things happen are vital due to the long-established nature of the field. There's a lot of juggling involved, and being proactive is essential. On the other hand, for resilience managers, effective communication and strategizing are key, as they need to convey customer-focused concepts and imagine potential customer pain points. The skills needed for each role vary slightly due to the practical and pragmatic nature of BC compared to the more conceptual and strategic focus of resilience management."

Head of operational resilience,
insurance sector, United Kingdom



Interestingly, "strategiser" is the least chosen attribute of a new BC manager, followed by "conceptual thinker", and "risk averse." This suggests that respondents have given answers on the basis of a BC manager who has yet to become more involved in the overall resilience of the organization. It is encouraging to see "formal authority" and "gives orders" towards the bottom of the table showing how a traditional "command and control" structure is less likely to be effective in most modern organizations. An interviewee highlighted how formal authority had dropped down the list of importance within their own organization.

"As a business resilience manager, the approach is consultative and focused on building relationships. The senior staff in the company have significant ownership, and policies alone may not be enough. Communication, motivation, and understanding what matters to each business area are crucial. We engage with senior management, one or two levels down, to explain the importance of resilience and collaborate to develop effective strategies. Formal authority is less important than the ability to communicate, motivate, and sell the message."

Senior business resilience design lead, logistics sector, Denmark

As would be expected, there are notable differences between geographies. While in the African region being a "communicator" (90.5%) and "collaborator" (90%) is considered a key requirement, other regions value different characteristics. In Australasia, a number of options were agreed to being important by 100% of respondents in the region: that of being "empathetic", a "risk taker", "process-oriented", "a delegator", "a problem solver", whilst also showing agility in their work, and possessing a high level of academic and professional qualification. In Europe, "empathetic" was the most highly considered attribute, with 100% of respondents from that region choosing this option. Meanwhile, north American respondents offered a different view: "controlling" and being "process oriented" both garnered 100% of responses in the region. In Asia, however, the characteristics earning 100% of responses were indicative of a very different way of working; here, the BC manager is seen as someone who "gives orders", is "risk averse", is "controlling, has granted authority" — whilst also inspiring others to solve problems. For multinational organizations, these differences should be reflected upon when building BC departments in different global regions.

Please choose the TOP five most important attributes you feel are important for a BC manager in 2023.

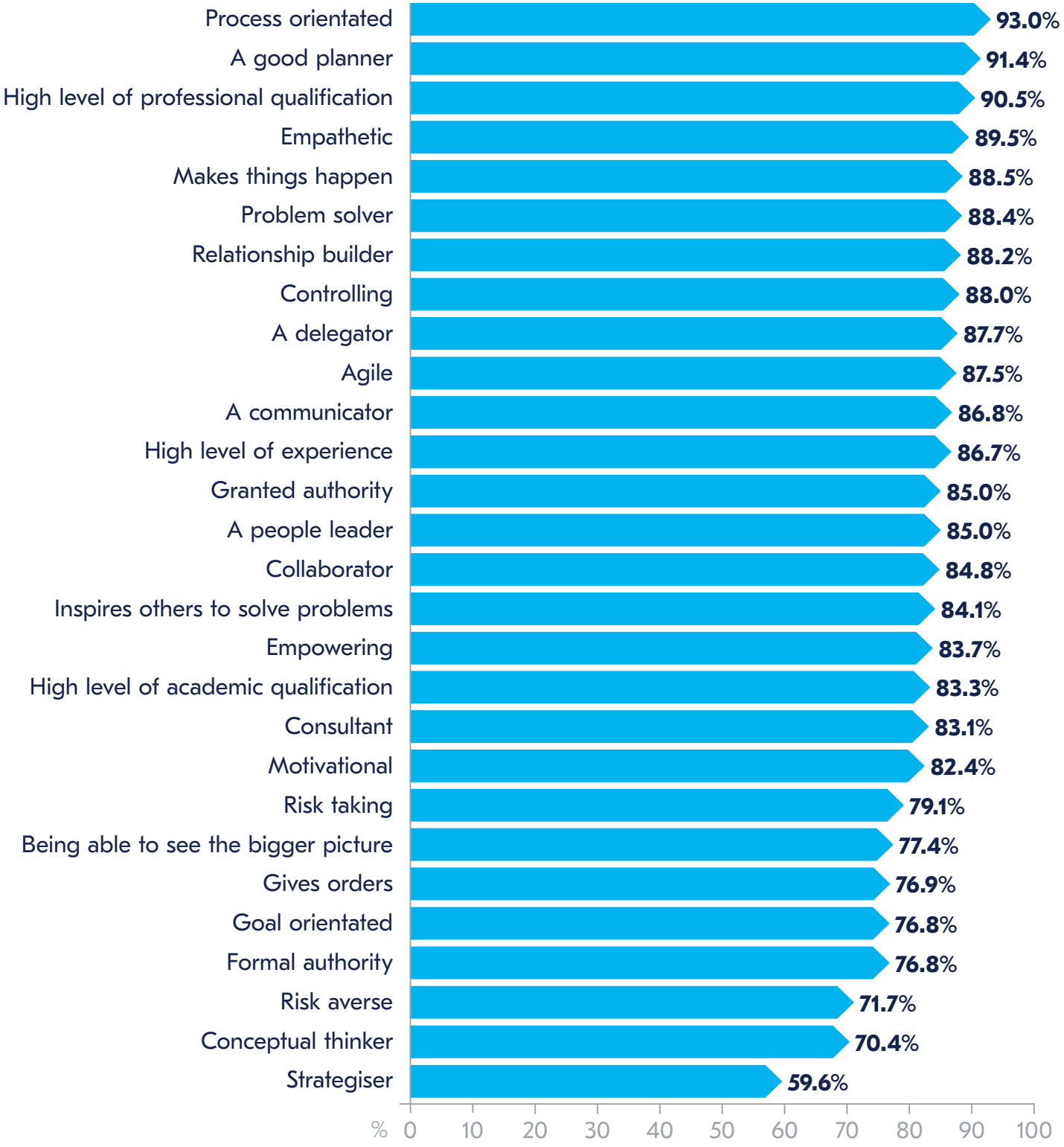


Figure 14. Please choose the TOP five most important attributes you feel are important for a BC manager in 2023.

A typical resilience manager is responsible for overseeing and implementing strategies to enhance an organization's overall resilience. Indeed, respondents considered the top five attributes of a resilience manager were as follows:

1 "Process-oriented" (83.5%):

Despite the focus on forward-thinking and a more strategic remit, a resilience manager still requires a strong focus on processes and procedures. They need to excel in implementing structured frameworks and methodologies that guide the organization in effectively managing disruptions and building resilience.

2 "Good planner" (79%):

Effective planning — just as with a BC manager — is a key attribute for a resilience manager. Resilience managers need to be able to assess potential risks, develop comprehensive resilience strategies, and create actionable plans that encompass various scenarios, ensuring the organization is well-prepared to respond and recover. It is important that such strategies and plans are developed with realistic and achievable goals around a workable schedule.

3 "Makes things happen" (76.8%):

Resilience managers need to be proactive and action-oriented in their thinking. They should possess the drive and determination to execute plans, mobilise resources, and overcome obstacles to ensure that resilience initiatives are implemented effectively across the organization.



4 "Relationship builder" (76.4%):

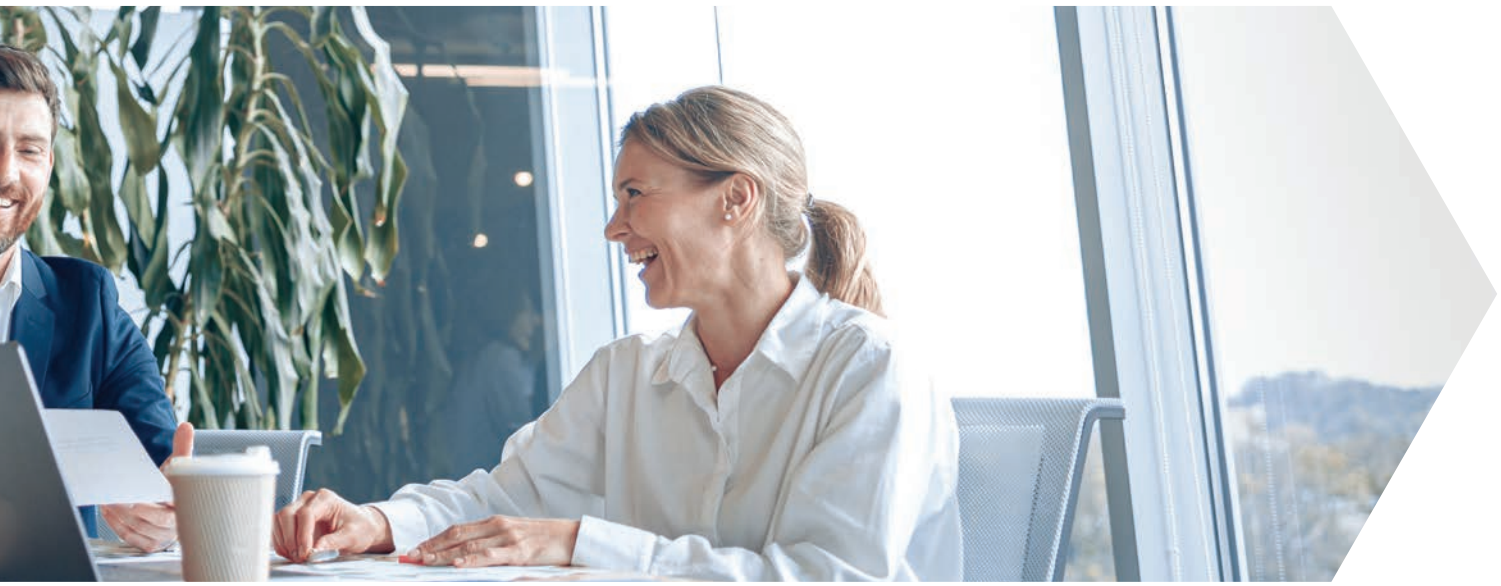
Building strong relationships and fostering collaboration is of paramount importance to ensure that resilience goals are achieved. Managers need to engage with stakeholders at all levels of the organization, creating partnerships that facilitate effective communication, coordination, and cooperation during times of disruption. In some organizations, a resilience manager may need to be gregarious in their approach — even adopting a salesperson approach in some cases — to ensure all necessary parts of an organization are on board with a resilience strategy.

> **"The method I will recommend going forward to raise awareness and increase engagement of resilience within the board is selling the positive impact of BC, DR, and overall resilience. Most programs do not do a good job of measuring success and failures, or setting goals to achieve."**
>
> Resiliency advisor, United States

5 "Empowering" (74.5%):

Leading on from being good relationship builders, resilience managers also need to empower employees and teams to take ownership of resilience initiatives. They create a culture that encourages innovation, continuous learning, and adaptability. By empowering individuals throughout the organization, resilience managers foster a sense of collective responsibility and resilience at all levels.

While attributes such as being a "strategiser," "risk-taking", "collaborator", "problem solver", and "motivational" were ranked lower in importance for a resilience manager, they still play a valuable role in the overall skill set of a resilience manager. These attributes contribute to the resilience manager's ability to analyse complex situations, navigate uncertainties, engage stakeholders, find innovative solutions, and inspire teams to embrace resilience as a shared goal.



Please choose the TOP 5 most important attributes you feel are important for a resilience manager in 2023.

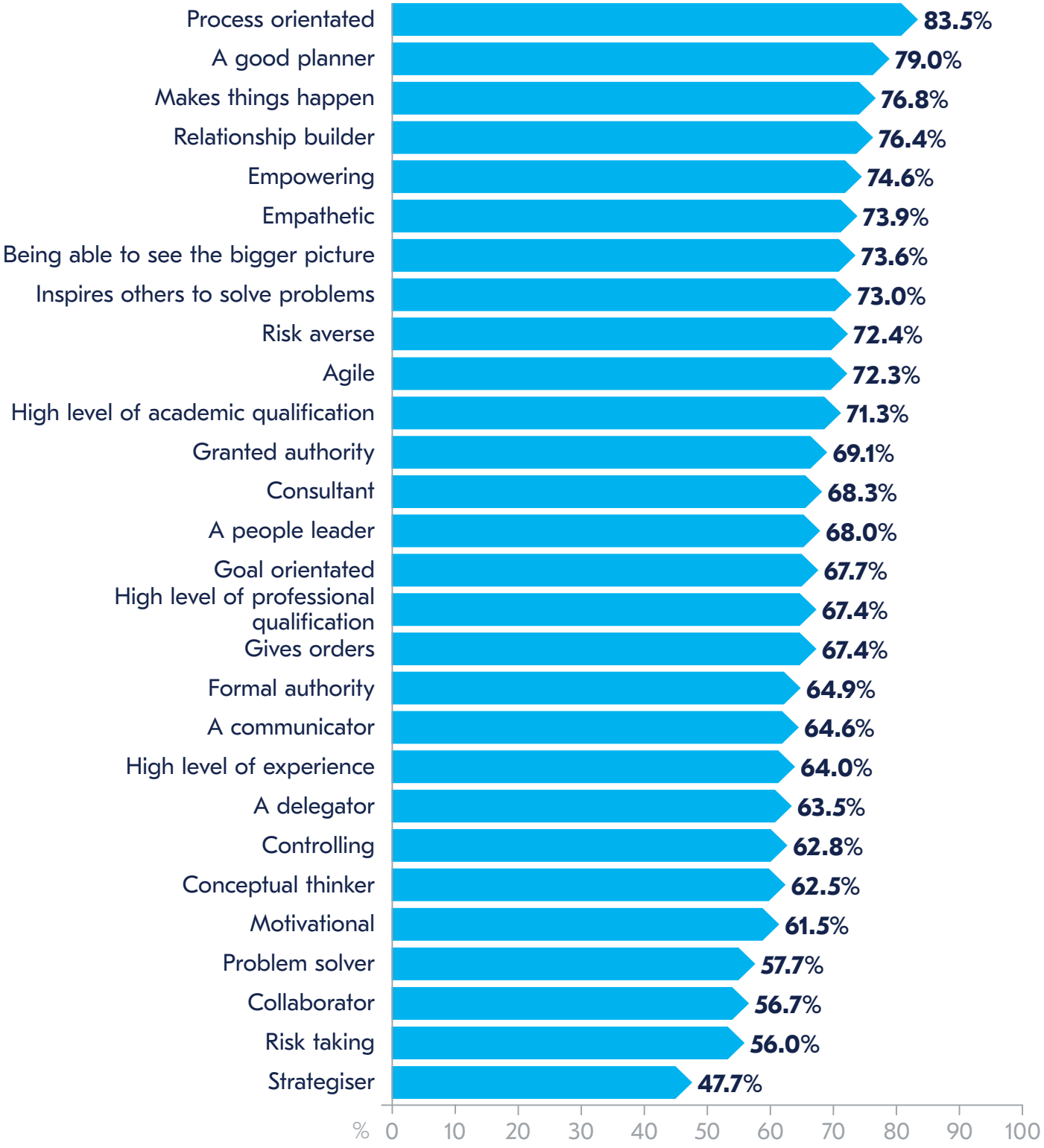


Figure 15. Please choose the TOP 5 most important attributes you feel are important for a resilience manager in 2023.

The placement of "strategiser" at the bottom of the list for both BC managers and resilience managers can be somewhat explained by the fact that a high percentage of organizations participating from the sample do not have a defined difference between BC and resilience. When compared with organizations that *do* have a clear and defined difference between BC and resilience, "strategiser" is considered to be the top attribute required of a resilience manager (88.4%), followed by "relationship builder" (82.5%) and "being able to see the bigger picture" (79.3%). This demonstrates the importance of having a defined definition of job roles and responsibilities.

Both BC and resilience managers share three of the top five preferred characteristics by respondents: that of being "process oriented," "a good planner", and "making things happen". The primary difference between the two roles is the importance of building relationships and being able to empower members of the organization for resilience managers, compared to a high level of professional qualification and empathetic qualities of the BC manager.

"I think making things happen is an important attribute to have as there is a lot of reluctance to do this work from the departments. It's up to the BC manager, the resilience manager, to make things happen. One thing I found that makes things happen is exercises. For people working within critical business services and business functions, they love them because it makes it real for them."

Resiliency advisor, United States

However, most of the aforementioned characteristics required of BC managers and resilience managers are considered people skills. People skills are the human-centred attributes that allow BC and resilience managers to excel in their roles. While technical knowledge is necessary, it is the combination of technical expertise with strong people skills that enables managers to effectively lead, communicate, collaborate, and adapt in the face of disruptions. By harnessing such skills, BC and resilience managers can drive successful resilience initiatives and build a culture of preparedness and adaptability within organizations with buy-in across the entire organization.

"When I started, people understood the importance of BC due to the impact of COVID and a significant cyber attack against the university. However, they had lost faith in BC plans as they weren't fit for purpose and weren't used during crises. So, we focused on creating usable plans that employees could actually refer to in times of need. We provided templates and action cards, allowing them to use familiar formats or drop relevant documents into the system. We offered assistance, conducted group discussions, and held regular surgeries to help them fill out BIAs. The key was getting buy-in from people, making them see the value of the plans. The culture was also changed to encourage openness and improvement rather than blame. We appointed BC champions in each faculty and service, selecting individuals interested and experienced in the field to support and drive the continuity efforts."

Resilience manager, higher education, United Kingdom

Resilience in the new working environment





Resilience in the new working environment

- **Remote/hybrid working is here to stay:** nearly a third of respondents expressed that "all staff" expect the flexibility to work from home for a proportion of their time.
- **Over two-thirds of respondents agreed that the same resilience standards are applied to remote/hybrid workers as they are to those on site:** there has been an improvement in the implementation of measures aimed at enhancing standards of resilience, whether they are remote or on site.
- **However there has been a decline in the implementation of health and safety standards for remote workers:** just a third believe the same levels of health and safety are applied to those working remotely.

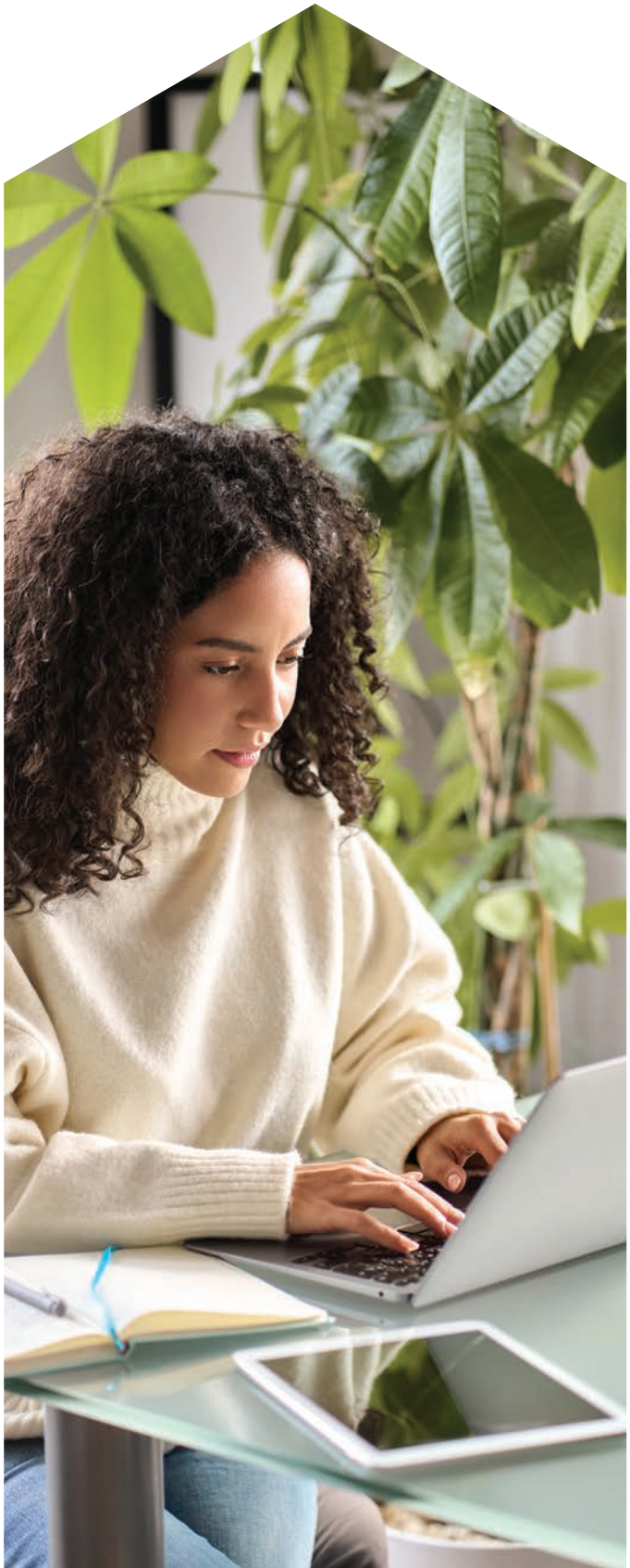
The COVID-19 pandemic brought about a seismic shift in the way we work, with remote or hybrid working becoming the norm for most office-based organizations. This sudden change had implications for BC and resilience professionals, who were tasked with ensuring operational stability in the face of unprecedented challenges. As we navigate the post-pandemic era, it is evident that remote and hybrid working models are likely to continue, bringing both opportunities and challenges to resilience professionals, staff, and senior management alike.

The new working environment heavily relies on technology to facilitate communication, collaboration, and workflow management. Video conferencing, instant messaging, project management tools, and cloud-based platforms have become essential for remote and hybrid teams. With teams dispersed across different locations, organizational dynamics have changed. Virtual meetings, digital collaboration, and asynchronous communication have become the norm. This not only requires new approaches to team building, leadership, and decision-making, but brings a greater level of risk to organizations. For example, if there is an Internet outage, meetings cannot take place through a remote means; if a provider such as Microsoft fails, organizations will not be able to use Office365 applications, email, and Teams. Organizations are also heavily dependent on data centres always being available, but even a 99.9% uptime guarantee can still result in organizations not being able to access data for a number of hours each year. IT is no longer just a department, it has become an intrinsic part of all company operations and communications.

Remote and hybrid working has become widespread. The survey findings support the notion that a significant majority of organizations (91.1%) acknowledge that "at least some staff" now anticipate the flexibility to work from home for a portion of their working hours. Almost 70% of organizations now have all or most of their staff working in a remote/hybrid way.

Interestingly, organizations where "most" staff expect to be able to work remotely is the most popular choice (39.5%). This represents a decrease of 4.9 percentage points year-on-year. However, this is countered by the 30.2% of cases where "all staff" now expect remote working, an increase of 4.3% year-on-year. This demonstrates that workers are increasingly becoming even more wedded to home office environments.

Just 3.3% of respondents reported that "most" or "all" staff in their organization prefer to work in an office environment full-time. This figure has remained stable since 2022 showing that a minority of staff still prefer the office environment, although the majority will have this dictated by the type of work that they do.





39.5%
Yes, this is the case for most staff

30.3%
Yes, this is the case for all staff

21.4%
Yes, this is the case for some staff

2.9%
Most staff would rather remain in an office environment

0.4%
All staff would rather remain in an office environment

2.5%
Unsure

2.9%
Not applicable

Figure 16. Do staff in your organization now expect the flexibility to work from home for a proportion of their time whatever role they play?

There are several advantages for BC and resilience professionals from the new working environment such as enhanced flexibility, the ability to work across many departments without needing to physically meet in a single location, as well as the attraction and retention of talent. Remote and hybrid working arrangements can offer greater flexibility in managing crises and disruptions. Professionals can work from various locations, ensuring continuity even during emergencies that would otherwise render the office inaccessible. Remote working also reduces dependence on physical infrastructure, making organizations less vulnerable to localised incidents such as natural disasters, power outages, or building evacuations. Finally, the ability to offer staff remote or hybrid working options has become a key factor in attracting and retaining top talent. It allows organizations to tap into a broader talent pool, regardless of geographical limitations.

"We have the space for the employees to go to work, and this is what we treat as our contingency now, the fact that we still have the building. Therefore, in the case there is a lack of power in the employee houses they can go to the office; we have a generator there and they still have their equipment. But it's not as efficient due to everyone being in the same building with the generator, and for many people it takes 1-2 hours to get to the offices. So, we have a problem with time that we were trying to fix."

Enterprise risk and business continuity senior manager, health insurance sector, Brazil

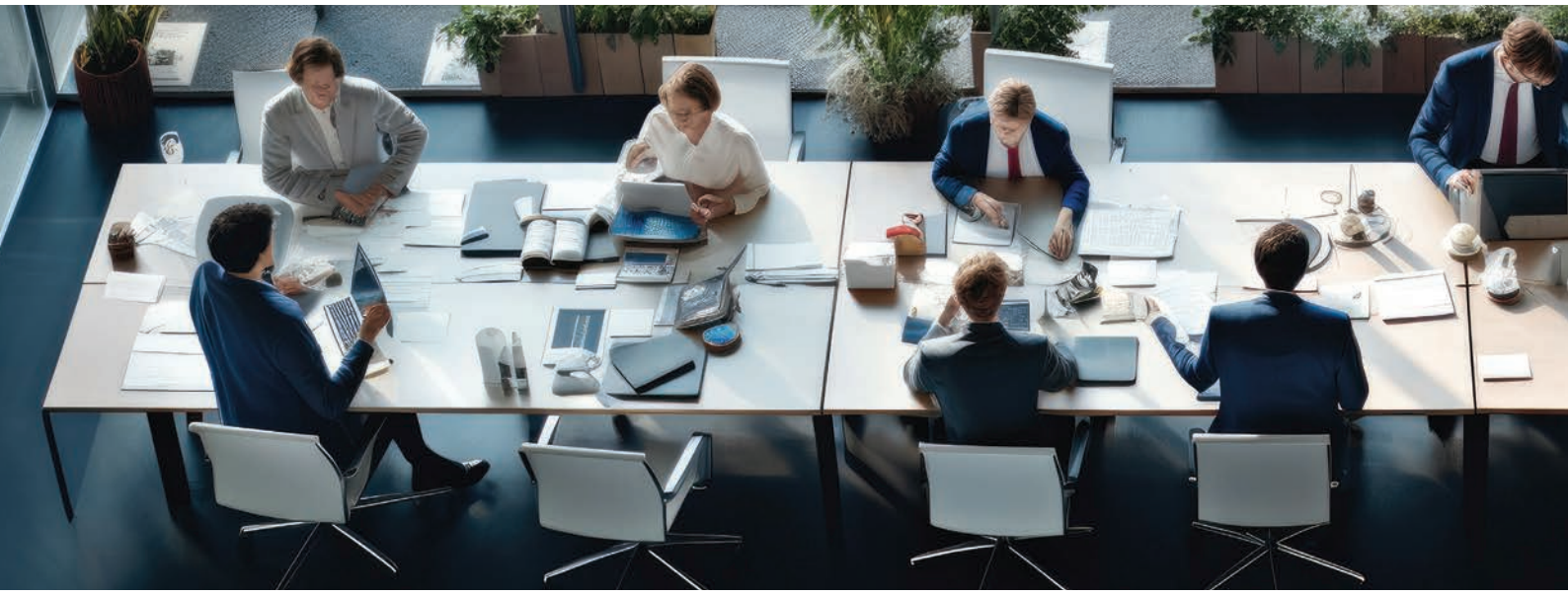
Despite the previously mentioned advantages of remote/hybrid working, there are also disadvantages that BC and resilience professionals need to consider: such as communication and collaboration challenges. Remote working can hinder spontaneous and face-to-face interactions, potentially impacting effective communication and collaboration. Ensuring smooth information flow and maintaining team cohesion requires careful planning and the use of appropriate digital tools. As already discussed, a reliance on technology means downtime has more of an impact than previously. An organization that formerly had 1,000 staff housed in a single office now has 1,000 staff housed in 1,000 home offices. BC and resilience plans needed to be written to cater for this remote working shift.

Furthermore, with employees working outside the secure office environment, organizations face increased risks to cyber security. With the primary means of viruses entering systems being via the user, BC and resilience professionals need to implement robust security measures and educate employees to mitigate potential threats. Remote and hybrid working models may also pose challenges to fostering a cohesive organizational culture.

Professionals need to find innovative ways to maintain shared values, employee engagement, and a sense of belonging within virtual teams. Many BC and resilience professionals report a close working relationship with HR in order to ensure appropriate measures are put in place to help ensure employees feel connected at all times.

When addressing the challenges that BC and resilience professionals face within the new working environment, respondents were asked if they applied the same standards of resilience (e.g. communications back-up) to remote workers as they do to on-premises workers. According to the survey, the majority of organizations adopted such resilience measures either during the pandemic (37.0%) or in the immediate years prior to the pandemic (23.9%). Nearly one in ten organizations (9.8%) had been very proactive and reported such measures were introduced over a decade ago.

However, it is concerning to see that despite most organizations offering remote/hybrid working arrangements, nearly a third (31.0%) of organizations stated that they currently have no extra resilience standards in place for remote workers.



However, 15.5% were either contemplating implementing these in the future (9.2%) or actively planning to introduce them (6.3%), which represents an increase of two percentage points year-on-year. Nevertheless, with 15.6% of respondents expressing that their organization has no intention to introduce resilience measures for remote workers, there is still some distance to go before universal adherence takes place. It also seems the larger the organization, the *less* likely they are to have measures in place. For the largest organizations (those employing more than 100,000 staff), nearly a quarter (23.8%) had no plans to introduce measures. For organizations employing less than 250 staff, the figure was more than halved (11.8%).

An interviewee from South Africa described how the increased risk of blackouts in the country was driving them to have more back-up solutions in place through a hub network, but providing back-up for individual remote environments was not yet something that had been considered. Another interviewee discussed how their offices had been reduced in size and streamlined during the pandemic, meaning that there would not be enough room for everyone to return to the office if there was a disruption which meant people could not work from home. Both interviewees clearly felt extra consideration needed to be given to remote worker power and connectivity back-up.

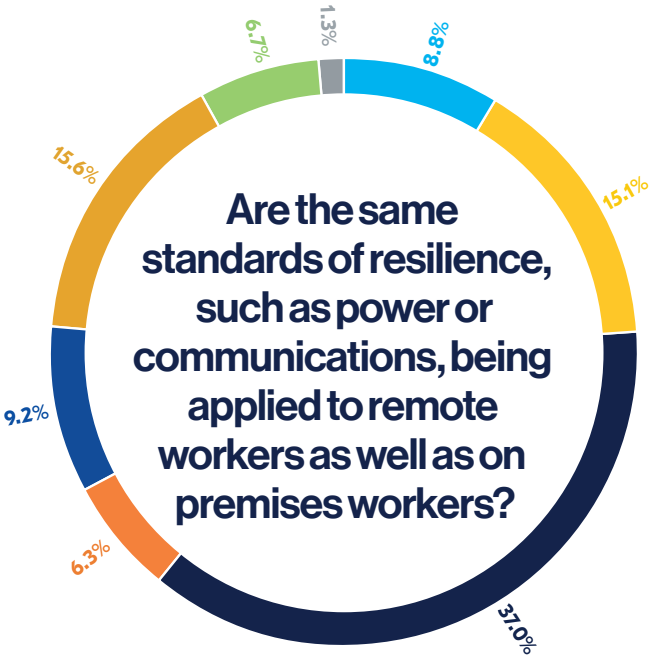


"Due to COVID, we allowed staff to work from home with laptops and internet connections, but we haven't focused on securing individual home workplaces. However, we are now addressing this in South Africa, where there's an increased risk of blackouts. We are working on solutions for certain hubs with satellite connections, cell phones, and better generators to enable prolonged operations."

Senior business resilience design lead, logistics sector, Denmark

"I've asked staff what happens if you lose power. Answer was, I just go into the office. If everyone decides to do that though, for example if there's a large power outage, don't expect to get a seat in a hurry because there's not enough seats during business as usual. We have reduced the size of our office footprints as well as our main office. There will be no space for everybody when they all show up at the same place when there is a significant disruption, the bigger picture has not been well thought through."

Business continuity specialist, healthcare sector, New Zealand



8.8%
Yes, and this has been the case for 10 years or more

15.1%
Yes, and this was introduced before the COVID-19 pandemic but more recently than 10 years ago

37.0%
Yes, and this was introduced during the COVID-19 pandemic

6.3%
Not yet, but we are actively planning this now

9.2%
Not yet, but it is being considered in the future

15.6%
No plans as yet

6.7%
Unsure

1.3%
Not applicable

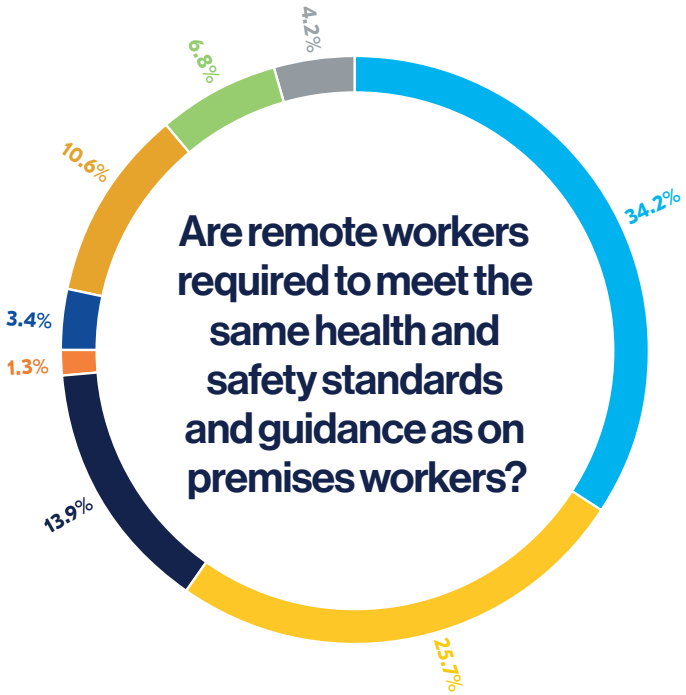
Figure 17. Are the same standards of resilience, such as power or communications, being applied to remote workers as well as on premises workers?

Respondents were also questioned about whether remote/hybrid staff were required to meet the same health and safety standards and guidance as on-premises workers. Most organizations were ensuring that measures were put in place; albeit limited in some organizations.



Although a marginal increase on last year's figures, only a third of respondents (34.2%) admitted that measures were exactly the same for remote workers as they were for office workers. A further quarter (25.7%) of respondents stated that, although measures were in place, improvement was needed. A further 13.9% said that measures were "somewhat" in place.





34.2%
Yes, exactly the same as in the office

25.7%
Yes, although there are some areas that need improvement

13.9%
Somewhat, although a lot of work still has to be done

1.3%
No, but we are actively putting measures in place now

3.4%
No, but we have started planning for it

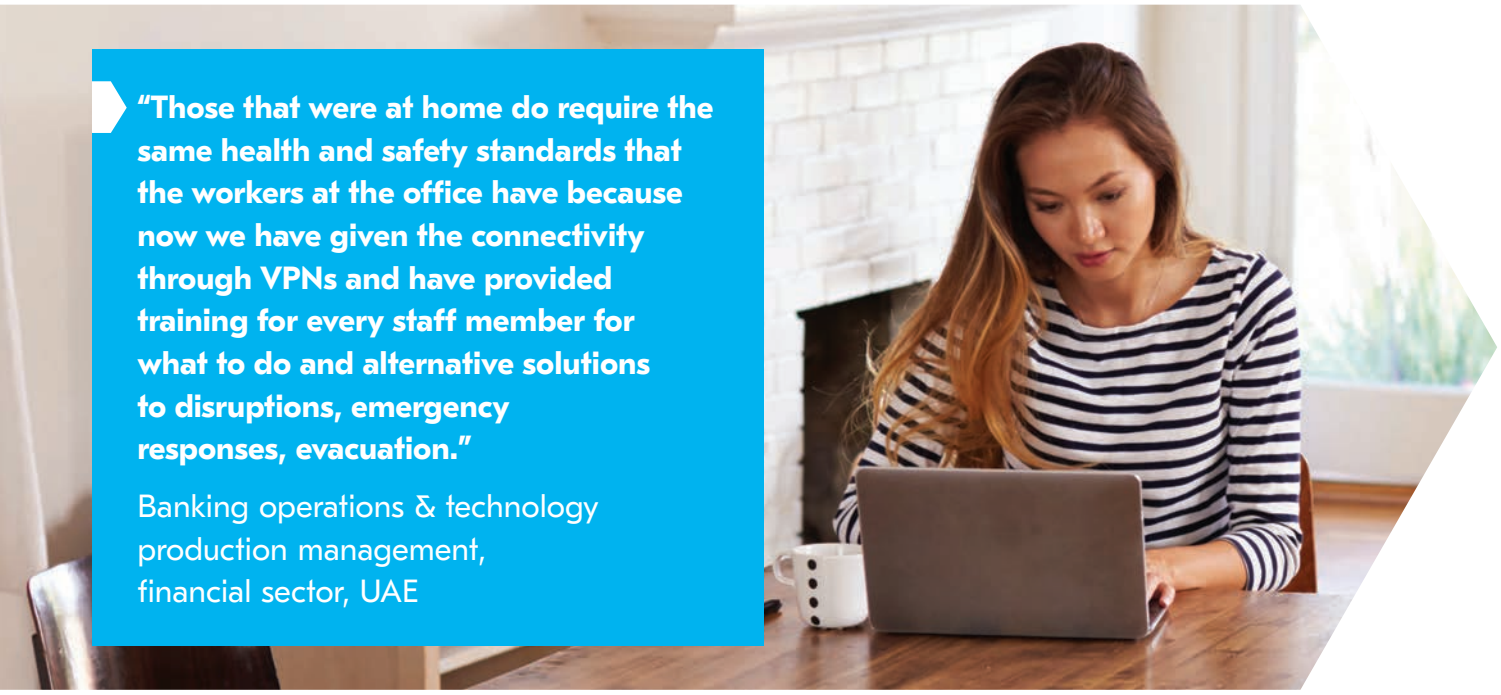
10.6%
We currently have no plans in place

6.8%
Unsure

4.2%
Not applicable

Figure 18. Are remote workers required to meet the same health and safety standards and guidance as on premises workers?

The combined positive responses of 73.8% does however show a decrease of 5.3 percentage points from the 2022 report, indicative of a decline in ensuring remote workers have safe working environments. Although COVID-19 pushed many organizations towards considering the health and safety challenges of a remote environment, as "the new normal" becomes "normal" this area has moved down the agenda. The challenges and complexities involved in implementing and monitoring health and safety standards for remote workers can be difficult. Some organizations have a large and dispersed workforce, others have limited resources available, and some lack the necessary expertise to develop and implement effective health and safety policies. However, some organizations are bucking the trend and ensuring that remote workers do have the same safety requirements applied to them.



"Those that were at home do require the same health and safety standards that the workers at the office have because now we have given the connectivity through VPNs and have provided training for every staff member for what to do and alternative solutions to disruptions, emergency responses, evacuation."

Banking operations & technology production management, financial sector, UAE

The law surrounding safety of homeworkers is still a grey area. Government regulation in the UK, for example, requires organizations to "have the same health and safety responsibilities for people working at home as for any other worker." In South Africa, employers have a legal obligation, "as far as is reasonably practicable," to ensure remote working environments are safe and without risks. However, in both these examples there is little differentiation between what employers "must" do and what employers "should" do. In some countries, workers report having to purchase their own equipment without consideration for health and safety, whilst large numbers of office workers in some countries admit to paying for their own training. A recent report by the International Labour Organization (ILO)[3] showed that 40% of homeworkers in the Philippines have paid for training courses themselves to better equip them with knowledge around the safety of home working.

The final consideration in this section looks at the practical steps organizations have taken to ensure the resilience of workplaces for both remote and onsite workers; and this year has seen a notable increase in the number of steps organizations have taken to ensure that workplaces are resilient. Organizations have recognised the importance of preparedness and have taken significant steps to ensure the continuity of operations in the face of various events. While participants acknowledged that office locations had more consideration given to resilience than in home environments, a notable percentage still had limited processes and procedures in place.

Two thirds of respondents (61.5% - an increase of 3.6% year-on-year) of respondents report they have power back-up systems in place within offices. However, the same consideration is not given to homeworkers: just a third (33.8%) of organizations confirmed that remote workers had measures in place to ensure resilience of power and communications. Furthermore, less than a quarter (22.7%) of organizations include plans to address broadband outages in their remote worker population. Whilst nearly half of respondents reported having plans in place to facilitate continuous operations in offices, no such measures are established for remote workers. More encouragingly, 44.4% of respondent organizations provide homeworkers with plans outlining alternative working arrangements in case of power outages, such as relocating to the office or moving to an unaffected area, an increase of nearly four percentage points compared to 2022. However, comments in interviews showed that returning to the workplace was the preference for ensuring continuity of work for homeworkers. The pandemic showed this cannot be relied upon as the only solution: what if there is another lockdown at the same time as a broadband failure, or the debris of a hurricane makes it impossible to reach the office? Factors such as these need to be considered when considering the resilience of remote working strategies.

Interestingly however, work area recovery sites, which many organizations had left as a result of not being able to use them during the pandemic, are now seeing a slight return in popularity. Work area recovery providers have considered the customer problems arising during COVID-19 and have made changes to contracts, as well as offering innovative solutions (such as back-up during a serious cyber attack) to better address organizations' contemporary resilience challenges. As such, they are now being used in contingency plans by a third (32.1%) of organizations, a slight increase of 1.5 percentage points year-on-year.

Encouragingly, more than a fifth (21.5%) of organizations conduct threat intelligence activities to ensure the resilience of workspaces. Other comments made by respondents were that their BC programme was based around an agnostic approach to incidents, with activity based on the recovery of critical activities regardless of cause. Other respondents discussed how they had ensured that recovery plans were established in all areas, whilst others had implemented "work from anywhere" regimes that allow staff to swiftly relocate to an area not affected by an incident. A minority of respondents were more negative with their assessments, recognising they had an "inconsistent approach given diversity of sites and activities" or that the measures mentioned in the survey have "not been considered" yet.

"Resilience is becoming more important, and we are focusing on incident-agnostic plans to plan for the effects of disruptions. In the BIA process, we now emphasise identifying workarounds as they automatically create the plan. We have developed plans for various scenarios, like power outages, new energy centre transitions, and hot weather impacts. Having specific plans for single events that can affect the entire university speeds up our response and allows us to focus on critical areas."

Resilience manager, higher education, United Kingdom

The previously mentioned improvement in the implementation of resilience measures reflects a growing understanding of the importance of preparedness, and the need to safeguard both remote and on-premises workplaces.

Considering some of the events that have happened in the past few years relating to extreme weather (global heatwaves, flooding, earthquakes) as well as areas afflicted by regular power outages, how are you ensuring that your workplaces (on-premise and remote) are resilient?

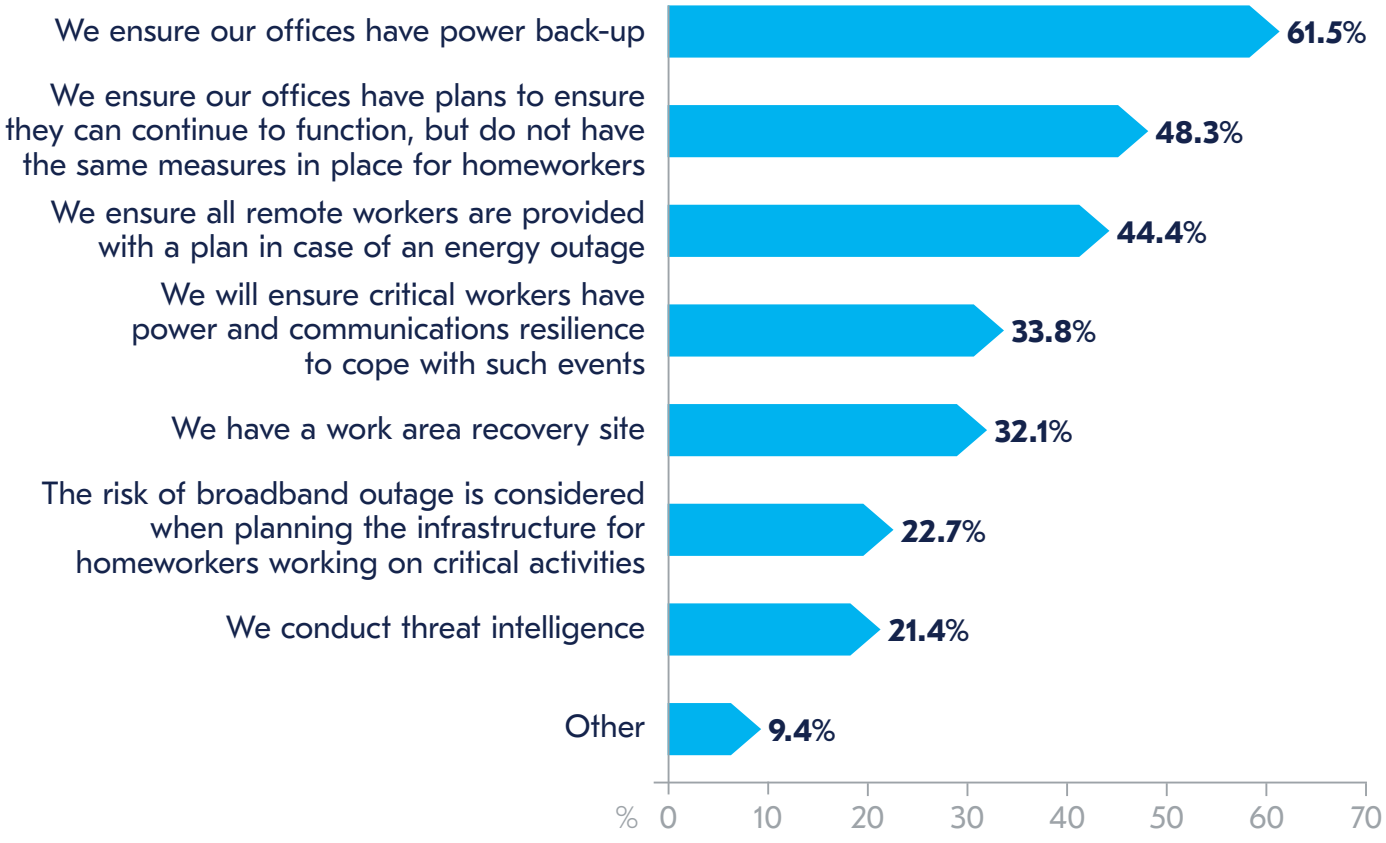


Figure 19. Considering some of the events that have happened in the past few years relating to extreme weather (global heatwaves, flooding, earthquakes) as well as areas afflicted by regular power outages, how are you ensuring that your workplaces (on-premise and remote) are resilient?

BC methods and techniques





BC methods and techniques

- **Organizations are increasingly leveraging technology to improve the speed and effectiveness of their BC/resilience processes:** nevertheless, despite the new and emerging technologies available on the market, many professionals are still reluctant to move away from their tried and tested older techniques (e.g., using Excel). For some organizations, technology investment still remains an issue.
- **Emergency notification software (37.7%) and BC planning software (32.1%) are the most popular tools used in organizations:** risk mapping software is the third most used tool, but its usage is less than half of the top two (15.4%).
- **There is an ever-increasing recognition of the ability of technology to help speed up the BIA process; providing consistency and aiding cross-departmental collaboration:** using technology to automate some of the BIA process (37.44%), providing coherence to BIAs across the organization (29.52), and enabling real-time updates to the BIA (20.26%) are the technology features most favoured by respondents.

In today's business environments, organizations are facing challenges that have the potential to impact their entire global operations and, with the example of COVID-19, have greater longevity than many professionals have experienced in a lifetime. Whether disruptions are caused by natural disasters, cyber threats, pandemics, or other unforeseen events, organizations need to ensure that their organizations are resilient to these threats, as well as proactively planning for their impact. Technology now plays a pivotal role in enabling organizations to effectively plan for and navigate disruptions: and emerge stronger. Respondents were asked what technology/software is used in their organizations to enhance BC/resilience processes and procedures.

Emergency notification software has the highest uptake in the survey, with an adoption rate of 37.7%. These tools facilitate efficient communication during disruptions, enabling organizations to alert and coordinate with employees, stakeholders, and response teams. With remote working now becoming the norm for many organizations, resilience professionals are seeking more from their tools, with the importance of two-way collaboration, geolocation technology, and satellite communication becoming some of the most desirable features of emergency notification software, according to the BCI Emergency Communications Report 2023[4].

More than a third of organizations (34.4%) report developing their own in-house solutions for BC/resilience purposes. This approach allows customisation to meet specific requirements and, for smaller organizations, can help to reduce costs. Although some organizations have developed bespoke applications with the assistance of their IT departments, interviewees largely spoke about how they had developed in-house systems based on spreadsheets and SharePoint. Some agreed it was not the ideal solution but, with the advanced reporting tools which are now available in enterprise software suites (such as Microsoft's PowerBI), the capabilities of such tools are much greater than as recently as five years ago. An interviewee described how they were working with university students to help develop new resilience software because purchasing software suitable for their requirements was prohibitive given their budget.

"The business impact analysis is done on Excel spreadsheets, and we just input the results on an internal software. This programme for us is more like a document repository."

Enterprise risk and business continuity senior manager, health insurance sector, Brazil

"We have an in-house developed solution in our organization for BC or resilience planning which is in SharePoint. It is manual; our BCM dashboard is currently done on Excel and stored on SharePoint. We are looking at linking it to an isometric system that we acquired for risk, but we've not yet ventured into discussions yet."

IT governance and risk manager, gaming & hospitality sector, South Africa

"I researched for business continuity management software which I anticipated we would get the OK. However, we're getting to the end of the financial year now and the budgets are tight, so we're now being told that it is too expensive. We're going to try and look for something internally. However, within the plans of community resilience, we could work with university students to develop software for us. I never give up and will continue to do what is right for the organisation and community resilience."

Business continuity specialist, healthcare sector, New Zealand

With an adoption rate of nearly a third (32.1%), cloud-based BC planning software is seeing much more widespread use in organizations compared to 2022. These solutions offer comprehensive functionalities for BIA analysis, plan development, collaboration, and reporting. Risk mapping software (with an adoption rate of 15.3%) and BC planning software (8.4%) are used by a considerable number of organizations to assess and visualise risks and their potential impacts. Some organizations report using multiple sources of data to build a comprehensive risk landscape and use datamining tools to produce a detailed profile of the risk landscape, as well as noting emerging risks. Members discussed using this technique to provide early warnings of potential pandemic outbreaks, whilst others used social media platforms to warn of breaking incidents.

What technology/software do you use in your organization for BC/resilience planning and/or administration within your organization?

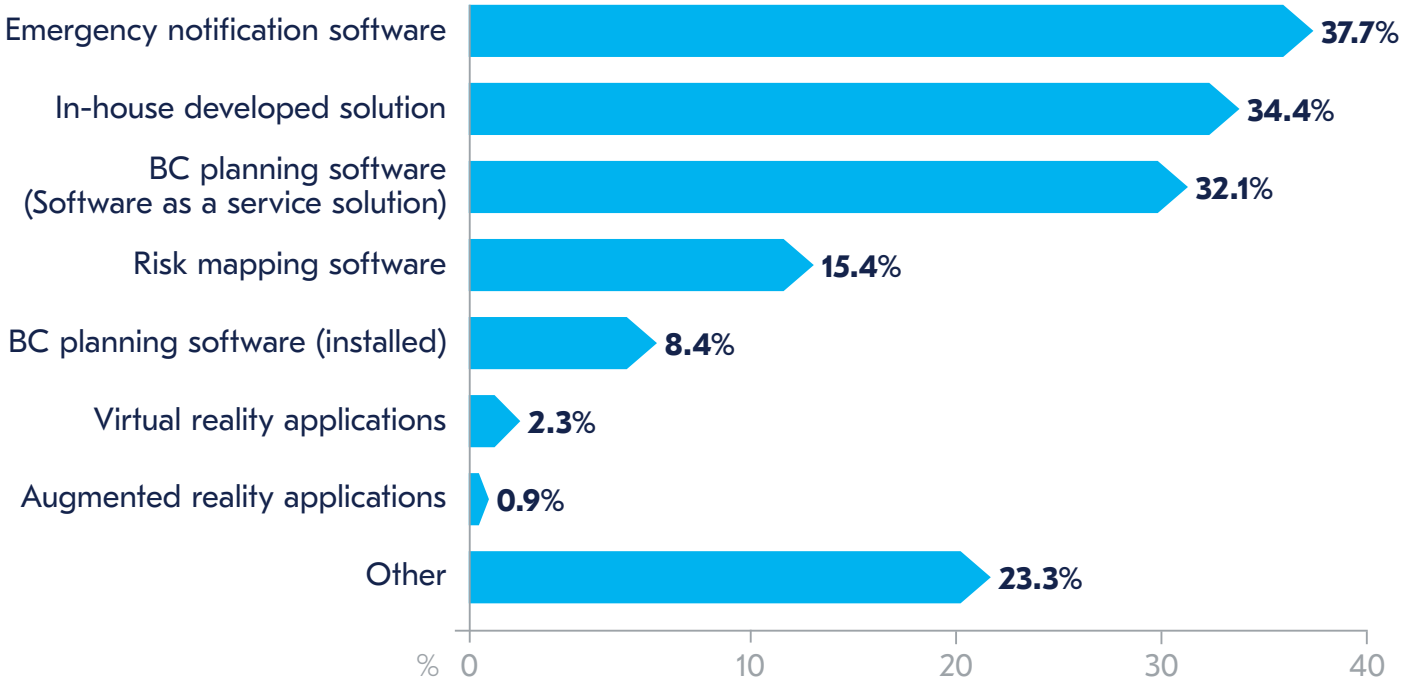


Figure 20. What technology/software do you use in your organization for BC/resilience planning and/or administration within your organization?

Augmented reality (AR) applications have a relatively low adoption rate for BIA analysis (2.3%). AR can enhance visualisation and understanding of critical processes and dependencies, but it is not yet widely utilised for this purpose. Like AR, virtual reality (VR) applications have a very low adoption rate, registering usage in less than 1% of organizations. VR can provide immersive experiences that enable users to simulate and evaluate different scenarios, contributing to a deeper understanding of potential impacts and recovery strategies. The BCI expects the use of these types of technology to rise over the medium-term as AR and VR become an everyday part of workers' online experience.

A large percentage of respondents (23.3%) said they used "other" tools, but this was dominated by comments about spreadsheets being used.

Using spreadsheets within a BC/resilience context

Many organizations use spreadsheets very effectively within their organizations, while others may not be able to afford the tools, software, and expertise required to embrace new technology within their organization. For those that do use spreadsheets, it is worth considering the following points in terms of data management.

Limited automation: spreadsheets often require manual data entry and manual formula inputs. This manual process can be time-consuming, prone to human error, and lacks the efficiency and automation capabilities offered by dedicated BC/resilience planning software.

Data integrity risks: spreadsheets often lack built-in data validation checks, making them susceptible to errors in formulas, incorrect data inputs, or accidental deletion. This increases the risk of data integrity issues and can compromise the accuracy and reliability of, for example, tracking near-misses.

Version control challenges: managing multiple versions of spreadsheets across different users or teams can lead to confusion and errors. It becomes difficult to track changes, consolidate updates, and maintain a centralised and up-to-date view of data. When multiple staff across multiple departments are, for example, updating their own BIAs, different versions may appear — often without a user realising.

Limited collaboration and sharing: collaboration on spreadsheets can be cumbersome, especially when multiple individuals or teams need to work on the same document simultaneously. Sharing and tracking changes across different users can be challenging, potentially leading to inconsistencies and data discrepancies.

Scalability issues: as organizations grow and their BC/resilience planning needs become more complex, spreadsheets may struggle to handle increasing volumes of data and expanding requirements. Maintaining large and interconnected spreadsheets becomes increasingly challenging and can hinder effective planning and administration.

Reporting and visualisation constraints: spreadsheets have limited capabilities for generating comprehensive reports and visualisations. Communicating insights and presenting data in a visually appealing manner can be challenging, making it difficult to effectively communicate BC/resilience plans to stakeholders. For those tasked with producing reports and visualisations, using spreadsheets in combination with other tools such as Tableau or PowerBI can help to present data in a more compelling way.

Lack of integration: spreadsheets are often standalone documents that are disconnected from other systems or tools within an organization. This lack of integration makes it difficult to align BC/resilience planning with other critical processes, such as risk management, incident response, or business operations. If this is the case, it is worth investigating tools such as SharePoint in order to increase collaboration on documents.

Dependency on spreadsheet expertise: using spreadsheets for BC/resilience planning and administration requires a certain level of expertise. Organizations may need to rely heavily on individuals with specific spreadsheet skills, which can pose challenges if those individuals are unavailable to help.

Difficulty in maintaining consistency: with multiple users and decentralised spreadsheets, ensuring consistency across different plans, calculations, and assumptions can be challenging. This inconsistency can lead to confusion, misalignment, and potential gaps in BC/resilience planning. Ideally, some kind of centralisation is ideal and, if resource is available, having someone checking consistency.

Collaboration is a primary theme of the report this year. Increased collaboration and breaking down silos are talked about year-on-year and we are now seeing positive movements towards this within BCI member organizations. Rather than inhibiting person-to-person communications, technology has proved itself to be the enabler for providing the tools, platforms, and infrastructure necessary for seamless collaboration across departments and stakeholders. By leveraging technology, organizations can foster cross-departmental insights, enhance communication and coordination, promote knowledge sharing, optimise resource management, engage external stakeholders, and facilitate remote collaboration. An interviewee described how they were looking to stop the siloed approach in the organization which, in doing so, would help to streamline the resilience process. Another talked about despite there being some internal resistance, this interviewee still believed collaboration was the best way forward and was trying to push it through.

"In our organization, we have approached BC by rushing to implement various types of continuity options, sometimes running them as separate programs. This has led to a slight disconnect between different elements of continuity planning. As a large and evolving organization, it can be challenging to effectively invoke the different plans in place. Currently, there is a siloed approach, but efforts are underway to combine and streamline our continuity efforts. In my function and the team, I work with, we have a good understanding of what we have in place, and we are actively engaged when disruptions, such as cyber attacks, occur due to our heavy exposure in daily operations."

Senior business resilience design lead, logistics sector, Denmark





"We're facing some resistance from various parts of the organization and even different organizations, but I strongly believe that collaboration is the most effective path forward. It's essential because there's expertise in other areas and emergency services that we don't possess internally. By tapping into their knowledge, we can benefit from their expertise as valuable experts. Currently, we are addressing the concerns and obstacles hindering this collaborative effort, actively working through them."

Police inspector - business continuity & operational resilience, public sector, UK

One of the core components of BC management is the business impact analysis (BIA). The idea of using technology to help automate the has been discussed — and debated — for a number of years. The consensus of these discussions was that whilst technology could greatly assist in streamlining, automating, and improving organizational consistency of BIAs, human intervention was still required at points throughout the process to ensure the viability of the documents. This year, respondents were asked if they were planning to change how they were running the BIA process and, if so, how they were planning to do it. The responses indicate a growing recognition of the importance of technology as well as cross-departmental collaboration. Despite the previously mentioned concerns about needed some degree of human input, incorporating technology solutions that enable real-time updates, coherence, automation, and cross-departmental input can enhance the effectiveness of the BIA process.

Are you changing/are planning to change how you run the BIA process? How are you doing/planning to do this?

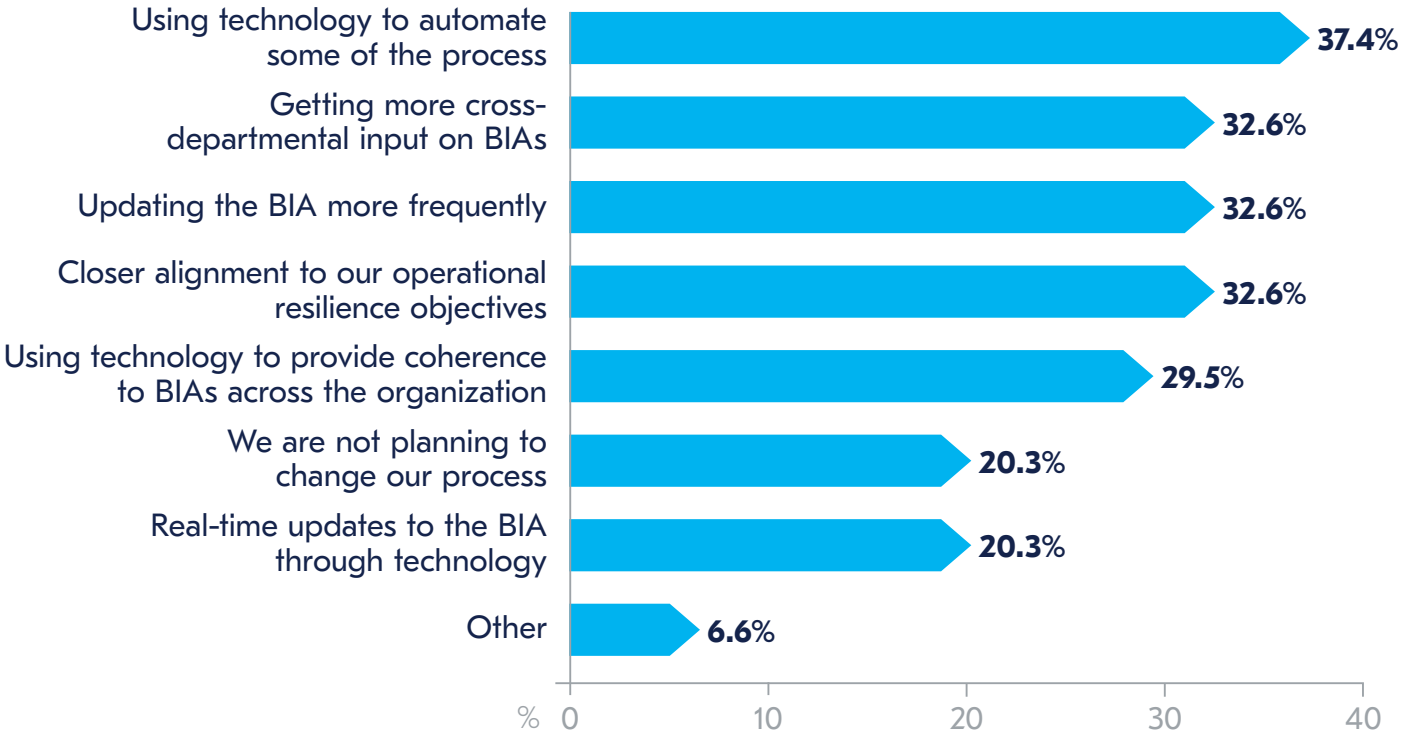


Figure 21. Are you changing/are planning to change how you run the BIA process? How are you doing/planning to do this?

Using technology to automate some of the BIA process was the most popular choice, with more than a third of respondents (37.4%) recognising the value of technology in automating certain aspects of the BIA process. Such an approach can streamline data collection, analysis, and updates through automated prompts, reducing manual effort, and enhancing efficiency. However, professionals should ensure that there is still manual intervention to ensure the automation is effective; and it is important that individuals still identify their critical activities and remain part of the process. Management involvement should also remain an integral part of the process.

"In terms of the BIA, we are indeed observing its continued significance as the linchpin of BC within organizations. However, there's a notable shift towards perceiving BIA processes as more agile and adaptable. Some are even exploring automation using BIA tools to streamline the process, though human input remains essential. Handling 480 BIAs across the organization with their inherent differences can be quite challenging."

Police inspector - business continuity & operational resilience, public sector, UK

Getting more cross-departmental input on BIAs was important for a third of respondents (32.6%) and demonstrates recognition of the importance of reducing siloed behaviour in the process. Involving stakeholders from different departments ensures a comprehensive understanding of interdependencies and potential impacts, leading to more accurate and robust BIA outcomes.

The same number of respondents also indicated a desire to update the BIA more frequently, symptomatic of an agile approach, to ensure the BIA is reflective of current conditions. This also enables organizations to identify and address emerging risks and changes in critical processes promptly.

A further third of respondents emphasised the importance of aligning the BIA process with their operational resilience objectives (32.6%). With incoming regulations in multiple jurisdictions, particularly in the financial services sector, the importance of this is likely to grow. This indicates a strategic approach to ensure that the BIA outcomes contribute to the organization's overall resilience, ensuring operational impacts can be considered alongside external, stakeholder-facing, impacts.

Using technology to provide coherence to BIAs across the organization (29.5%) reflects organizations' focus on leveraging technology to achieve consistency and alignment in their BIA processes. By adopting technology solutions, organizations can ensure that different departments or locations follow standardised methodologies and templates, promoting a coherent approach t o BIA analysis.

A notable minority of respondents (20.3%) report that they are already incorporating or planning to incorporate real-time updates to the BIA through technology. This approach ensures that the BIA remains current and reflects the evolving business landscape, allowing organizations to adapt quickly to any changes and/or events. However, any real-time updates will need to be managed effectively to ensure all stakeholders in the BIA process are aware of changes; and that any suggested automations can be modified or cancelled.

Only a fifth (20.3%) of respondents indicated that they have no plans to change their current BIA process. This may suggest that existing processes are perceived as effective, or there might be limitations, such as resource constraints or resistance to change, preventing them from making significant changes at this time. While technology offers numerous benefits for BIA analysis, some professionals may face barriers such as limited awareness, resource constraints, resistance to change, and perceived complexity. Relying on spreadsheets for BIA analysis can limit the opportunities for automation, reporting, and centralised data management; poses data integrity risks and scalability challenges; reduces efficiency with updates; and can lead to greater maintenance and administration. By recognising these limitations and understanding the advantages of adopting technology to assist with the BIA process, organizations can make informed decisions on how to enhance the efficiency, accuracy, and overall effectiveness of the process.

Organizational support for BC and resilience





Organizational support for BC and resilience

- **More than 80% of respondents report a heightened recognition of the importance of having a BC and/or resilience programme:** many cite COVID-19 as being the prime enabler to this, with more recent events helping to further the cause.
- **Two-thirds of organizations (66.7%) have seen an increased level of financial and resource support in the past year:** this is three percentage points higher than last year and demonstrates that resilience is still seen as an investment area for organizations, despite rising inflation in many parts of the world.
- **Professionals are using greater team collaboration and regular training and exercising to ensure senior management/board level interest is maintained:** professionals are increasingly leveraging technology to support training to this end using techniques such as microsimulations to help maintain the support of time-poor senior executives.

The visibility of BC and resilience programmes within organizations has experienced a notable increase in recent times due to a series of impactful events. Events such as the COVID-19 pandemic, energy crises, trade wars, geopolitical tensions, cyber attacks, and economic downturns have served as wake-up calls, highlighting the need for organizations to be prepared for unexpected disruptions. These events have exposed vulnerabilities and demonstrated the significant impact that disruptions can have on business operations, customer trust, and overall sustainability. As a result, organizations have recognised the necessity of robust BC and resilience programmes to ensure their ability to navigate and recover from such challenges. The increased visibility of these programmes underscores the growing realisation that investing in preparedness and resilience is essential for long-term success and competitiveness in today's environment.

This section will examine the level of support for in organizations for good BC and/or resilience. Additionally, this section will evaluate whether this recognition is matched by an equitable allocation of resources to support such programmes. With this aim, respondents were asked if the appreciation of the importance of having a BC and/or resilience programme in place has risen in the last few years as a result of the wide range of events that affected institutions worldwide.

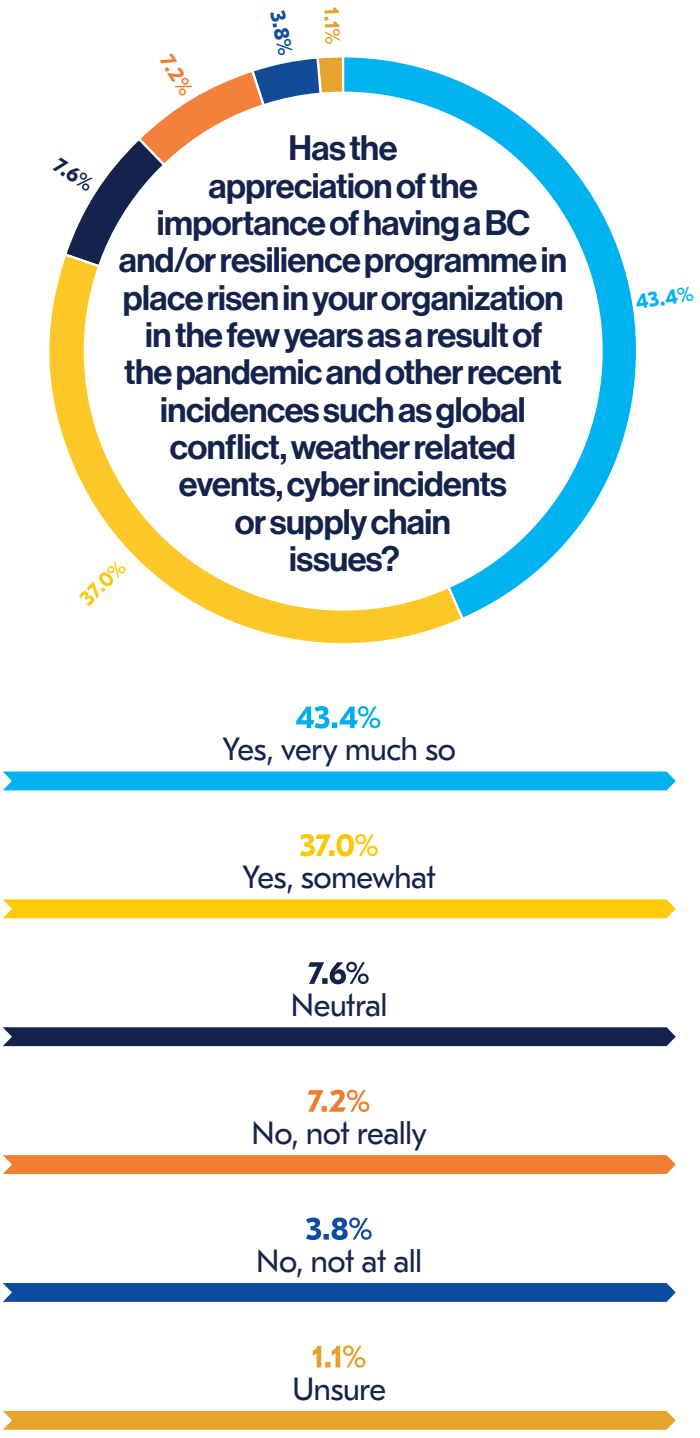


Figure 22. Has the appreciation of the importance of having a BC and/or resilience programme in place risen in your organization in the few years as a result of the pandemic and other recent incidences such as global conflict, weather related events, cyber incidents or supply chain issues?

More than four in five respondents identified an increased management appreciation of the importance of having a BC and/or resilience programme in place in 2023. 43.4% of respondents said appreciation had grown "very much" and, with a three-percentage point increase on last year, this shows that the direction is promising. Furthermore, 37% of organizations have "somewhat" increased their appreciation, an increase of nearly four-percentage points year-on-year. To add to these positive statistics, the percentage of respondents who reported that the appreciation of BC and/or resilience had declined decreased from 10% in 2022 to 7.2% in 2023.

However, is this increased appreciation for BC/resilience plans accompanied by the necessary resources to support such programmes? The answer is an unequivocal "yes." 66.7% of respondents noted an increase on the number of resources from a finance or resource perspective in the last year. 36.1% of respondents noted an increase in both, up from 33.8% in 2022. This represents an increase of 2.3 percentage points year-on-year. Interviewees spoke about how COVID-19 had been the trigger for raising awareness of the importance of resilience, with extra funding being channelled towards initiatives, as well as resilience being on the agenda of every board meeting. For some, it was not all positive, however. An interviewee spoke about how senior management had initially been very engaged with resilience activities but, over time, the interest had waned. This shows just how important it is to maintain close communications and continually develop ideas to improve engagement.

"There has been increased support for BC and resilience, mainly triggered by the impact of COVID which demonstrated the importance of having a plan in place. Now, I'm receiving requests from the CFO and CIO to develop a national grid failure plan. There's a growing emphasis on having processes in case of disruptions. As awareness grows about how everything connects, I've been receiving more investment in BCM initiatives. We executed BCM awareness campaign, and it was well-received in the organization. Top management has shown significant buy-in, and BCM is an agenda item in in all our company meetings."

IT governance and risk manager, gaming & hospitality sector, South Africa

"The organization has appreciated having a BC or resilience program in place over the past few years as a result of COVID. No one knows what to do because the epidemic was being experienced by everyone on Earth for the first time. At this point, the webpage's significance and the value of BCM and resilience significantly increased. This gives me more support at board level to do different initiatives, and then with the employees, they're more receptive to it."

Banking operations & technology production management, financial sector, UAE



"One of the top attributes that is most important now than 10 years ago is being a good communicator. You need to be able to get other people on board when you see an issue, bring them on the journey, so they understand why it's important and why we need to invest in a solution. Without being able to bring people along, then you're not going to get the same level of commitment to deal with the problem. We have spent a lot of money on resilience in relation to our buildings, as well as ensuring staff are able to work remotely by purchasing mobile devices and other things."

Police inspector - business continuity & operational resilience, public sector, UK

"There has been increased support from the organization, which was evident by creating my role as a resilience manager and also a risk manager role. They realised the importance of addressing resilience issues and invested in bringing in people like me to tackle these challenges across the university... ...The organization has not forced others to do BC as part of their job, but the key has been helping them understand that they are already performing aspects of BC in their roles. We have emphasised that they need to acknowledge it and document it in a BIA once a year or as needed. The goal is to make everyone aware that they are already contributing to BC and encourage them to formalise it on paper."

Resilience manager, higher education, United Kingdom

"We must get buy in from the executive leadership team. However, one of the resilience strategic aims for the organisation dropped off. I always reminded people we need to be resilient within ourselves to be able to enhance community resilience. It is unfortunate that resilience has fallen off our strategic radar."

Business continuity specialist healthcare sector, New Zealand





36.1%
Yes, from a financial and resource perspective

25.1%
Yes, but from a resource perspective only

5.5%
Yes, but from a financial perspective only

22.4%
No, not at this current time

3.2%
No, support from a financial and resource perspective has reduced

4.1%
Unsure

2.3%
Other

1.4%
Not applicable

Figure 23. In recent years, have you seen increased support for BC and resilience within your organization?

When respondents were asked about which methods they would consider going forward to raise awareness and/or increase engagement of BC within the board, the most popular answers were to provide greater collaboration between teams to ensure that resilience goals can be met, and enrol BC "champions" across the business. Furthermore, 38.4% of respondents said they had ensured/will ensure a regular training and exercising process is established while the board are favourable, and a further 28% of respondents believe in leveraging technology for this purpose by exploiting new technologies to run shorter and more targeted training programmes to increase engagement. An interviewee discussed how they had used disaster scenarios to help increase engagement within the organization which, in turn, had increased the level of finance and resource.

"One of the key methods we used to increase engagement in BC within the organization was showcasing disaster scenarios and providing effective solutions. We demonstrated how critical aspects, like call receipt centres, could be diversified to ensure continued operation during challenges. Our approach helped emphasise the importance of BC and garnered increased support, even from the finance and resource perspectives."

Police inspector - business continuity & operational resilience, public sector, UK

However, less than half of respondents (43.1%) reported that the board/senior leadership team already had a good awareness of BC, and that BC or resilience was routinely discussed. This shows that despite the progress, there is still some way to go. One interviewee described how they were trying to get basic e-learning in place to help build awareness, which was currently very limited within their organization.

"Enrolling champions across the business and ensuring regular training and exercising are matters that I always consider going forward to raise awareness or increase engagement of BC within the board. When I do a grid scenario or I run a simulation, we engage other teams within the organisation to ensure we taking a combined assurance approach. I ensure we can get as many people in the room when doing simulations, by this I mean not only the directors or managers, but also the people on the ground, who are doing the operational tasks - everyone's in the room — for a better outcome!"

IT governance and risk manager, gaming & hospitality sector, South Africa

"There's no awareness training, it's very limited. We're still putting the e-learning together. Naturally we prefer f2f, but will move to online platform shortly, gaining great traction with all the heads of business."

Head of resilience, professional services, Asia

What methods will you consider going forward to raise awareness and/or increase engagement of BC within the board?

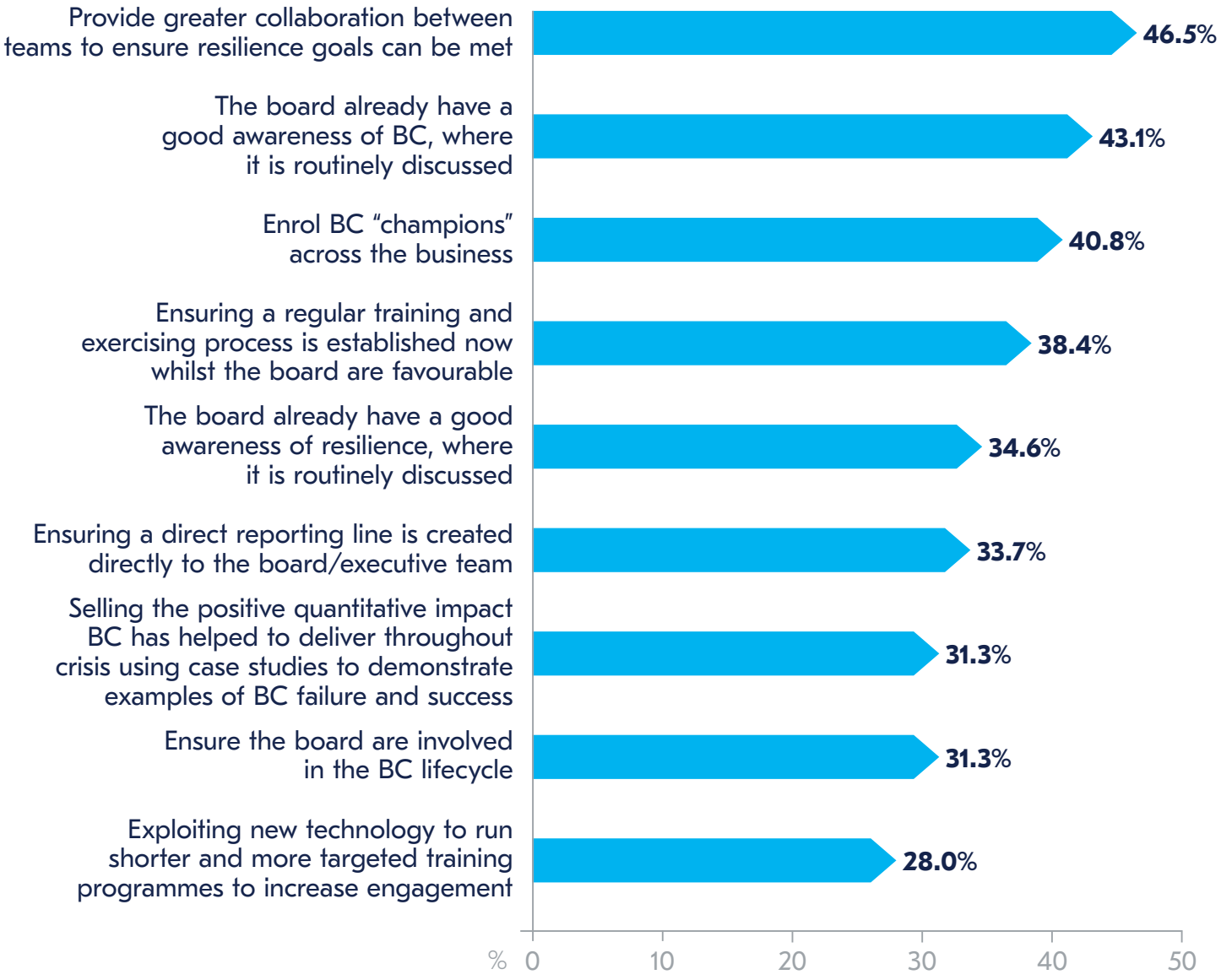


Figure 24. What methods will you consider going forward to raise awareness and/or increase engagement of BC within the board?

What's next? The future of BC and resilience





What's next? The future of BC and resilience

- **The future of BC and resilience will place increasing importance on cross-team collaboration, senior management attention, and training and exercising of plans over the next five years:** furthermore, many professionals will have to add expertise on operational resilience and organization resilience to their skills portfolio to better address the challenges their organization faces.
- **The BIA continues to be at the heart of shaping the overall preparedness and response strategies of organizations and will continue to be so in the near- to medium-term:** however, there is a noticeable shift in how practitioners approach the BIA process, which was discussed in the previous section.
- **The two aspects that will be the least important over the next five years are treating BC as a mere "tick box" exercise, and maintaining premises-focused programmes:** the shift from maintaining premises-focused plans is something that would have been unheard of in the years prior to COVID-19, and dictates a concerted shift in the planning process.

It is important to understand the ways in which practitioners see the discipline developing in the future. A diverse number of events have occurred in the last five years, which has propelled organizations in many different directions and which has resulted in new thoughts and ideas on how to address the resilience challenges of this "new world". To gain greater understanding of the focus of these changes, respondents were presented with a list of BC and resilience aspects and were asked to rate how the importance of each is likely to change over the next five years.

Considering the different aspects of BC and resilience, please indicate how you see the importance of these aspects changing over the next five years:

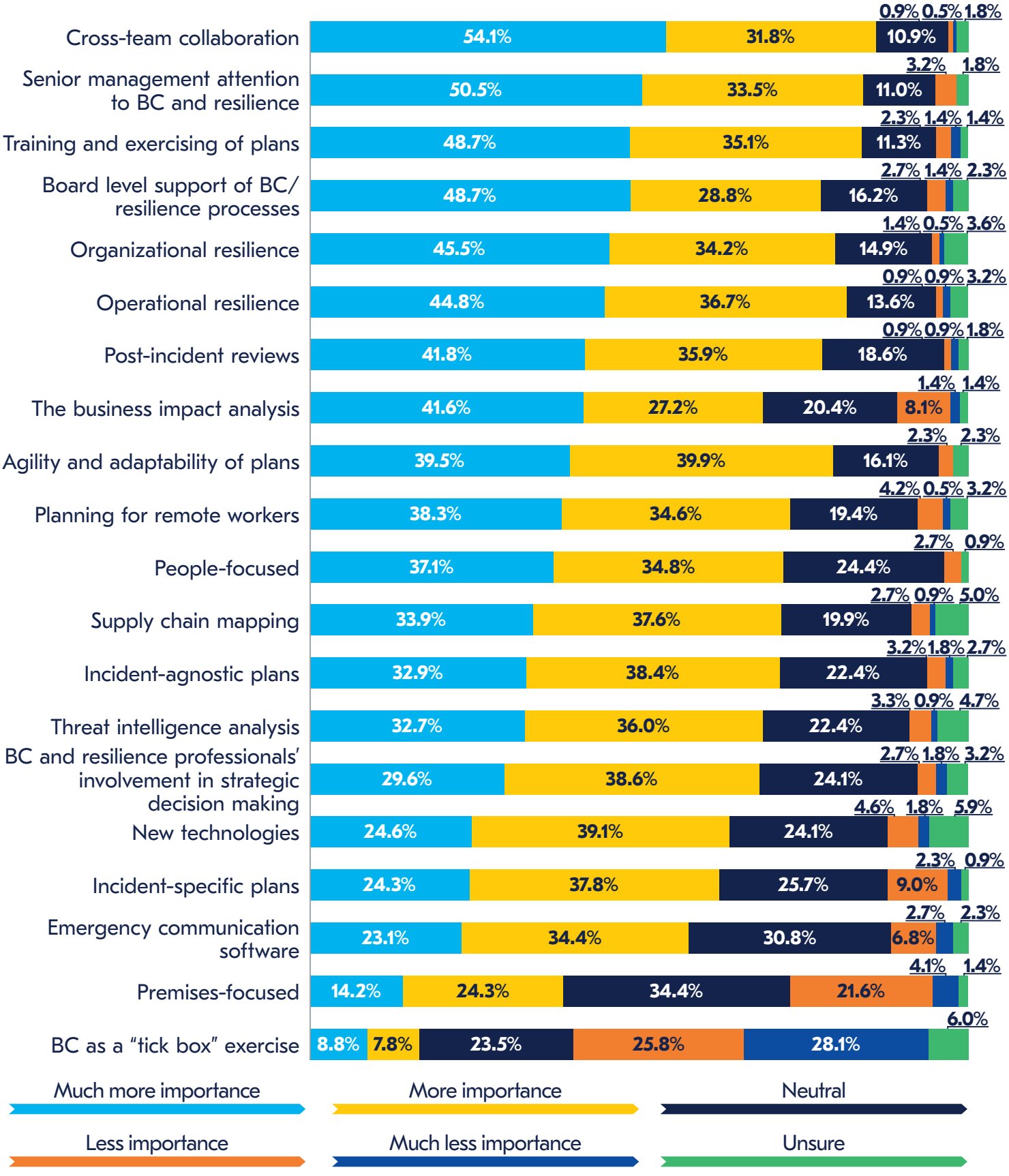


Figure 25. Considering the different aspects of BC and resilience, please indicate how you see the importance of these aspects changing over the next five years:

Last year's top five answers which attracted the most "much more" and "more" votes were senior management attention to BC and resilience (88.3%), c-suite level support for BC/resilience (85.2%), training and exercising of plans (87.7%), agility and adaptability of plans (86.9%), and cross team collaboration (86.4%).

This year has seen a shift in priorities and a change in the top five choices. Cross team collaboration has moved from fifth to first place (85.9%), while senior management attention to BC and resilience has dropped a place to second — perhaps indicative of the comments made in the previous section that professionals are seeing greater support from senior management this year (84.0%). Training and exercising of plans retains its third place (83.8%), while the emergence of operational resilience (81.5%) and organizational resilience (79.7%) in fourth and fifth place is demonstrative of the strategic shift towards resilience, either through good practice or because of incoming regulation. Agility and adaptability of plans, in the top five last year, was in sixth place this year, with 79.4% of respondents stating that the change of this aspect of BC and resilience will be much more important/more important over the next five years. The near four in five professionals who selected this option does cement the comments made in the earlier sections of this report about how agility and adaptability is becoming increasingly important. Agility and adaptability of plans was a common theme in the interview process.

"Over the next five years, I think the importance of agility and adaptability plans will increase. After the pandemic, I saw our processes become much faster than it used to be. Pre-pandemic, I had my schedule of the actualization of the plans, and it was annual. Nowadays, if I stay one year without reviewing a plan, most of them will be completely obsolete. So, I know that I need to have these adjustments faster and empower more of the area to make these adjustments."

Enterprise risk and business continuity senior manager, health insurance sector, Brazil

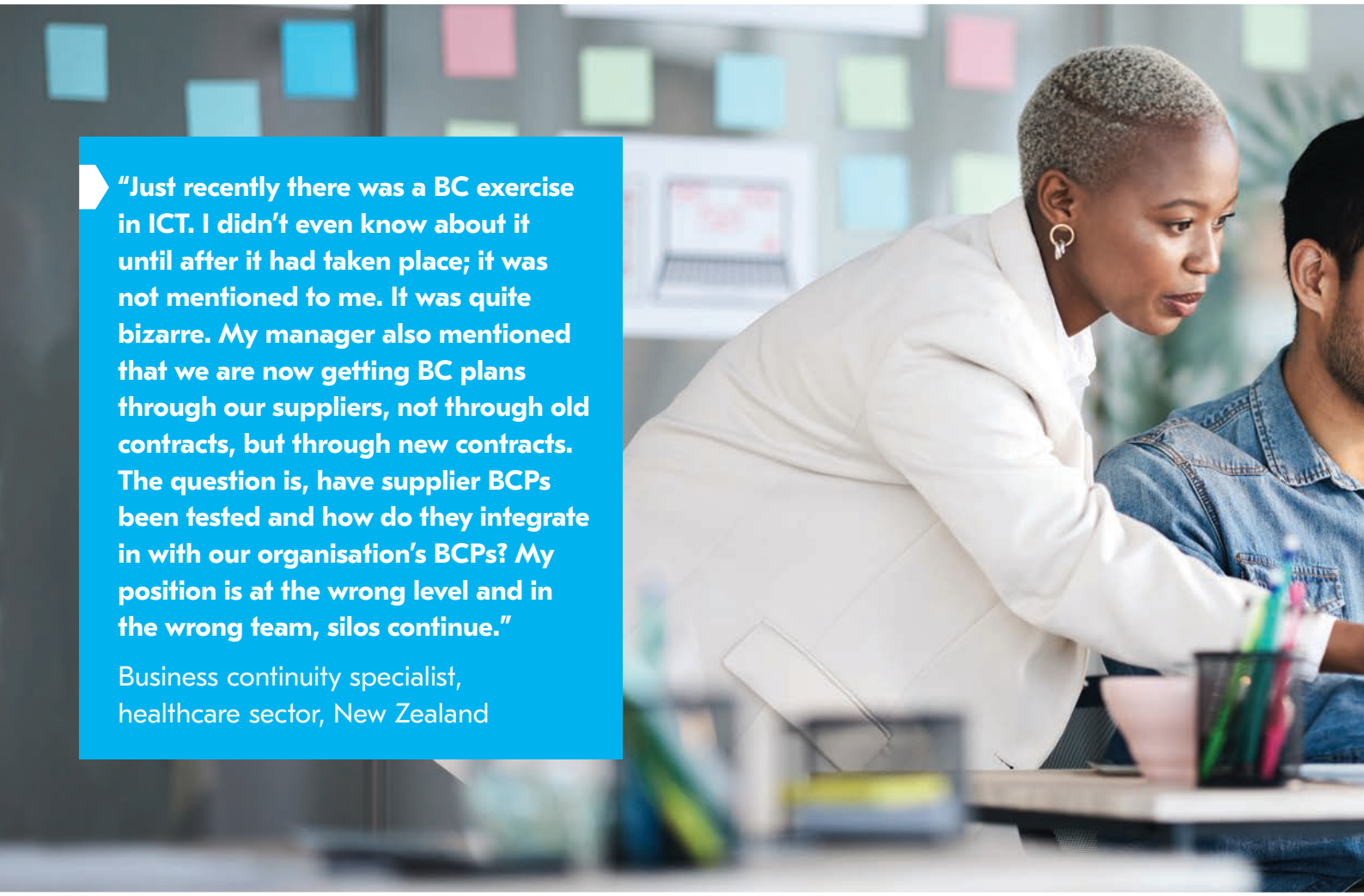
"Local management understanding of the importance of the BIA is crucial to ensure the success of it. Post-incident reviews were not done regularly in the past due to the rush to handle crises, but now we aim to focus more on extracting valuable learnings and implementing actions. Senior management's attention and support are becoming more important, especially as we are conducting a customer contract review, and there is a demand for resilient solutions from our largest customers. Agility and adaptability of plans are also gaining importance in our approach."

Senior business resilience design lead, logistics sector, Denmark

As businesses face complex and evolving challenges, cross-team collaboration becomes a vital tool in the resilience jigsaw. Organizations are coming to the realisation that siloed approaches are insufficient to address the interconnected nature of disruptions. Collaborative efforts involving multiple teams, departments, and stakeholders enable a holistic understanding of risks, facilitate the sharing of knowledge and resources, and enhance response capabilities. This collaborative mindset fosters agility, adaptability, and effective decision-making during disruptive events.

BC and resilience must remain a top priority for senior management in order to create a culture of preparedness throughout the organization. There still needs to be a greater appreciation of the strategic significance of continuity planning amongst senior managers, and better resource allocation may be needed to ensure organizations retain their resilience going forward. They will have to actively engage in risk assessment, support the development and implementation of robust plans, and provide necessary guidance during crises.

An interviewee explained how they felt that their relationship with senior management was poor and caused siloed behaviours to continue. They felt that BC needed to be closer to senior management to bring greater awareness to the importance of resilience.



"Just recently there was a BC exercise in ICT. I didn't even know about it until after it had taken place; it was not mentioned to me. It was quite bizarre. My manager also mentioned that we are now getting BC plans through our suppliers, not through old contracts, but through new contracts. The question is, have supplier BCPs been tested and how do they integrate in with our organisation's BCPs? My position is at the wrong level and in the wrong team, silos continue."

Business continuity specialist, healthcare sector, New Zealand

Over the next five years, respondees see the importance of regular training and exercising of BC and resilience plans rising even further. By regularly evaluating and updating plans based on lessons learned, organizations can enhance their ability to respond effectively to disruptions. COVID-19 helped to highlight a lack of training and awareness of how staff react in a crisis and, in many cases, senior management — who had often been against training and exercising as it took time out of employees' days — are now pushing for more training to be carried out.

As more regulations are launched and operational resilience gains greater cross-sector recognition, emphasising redundancy, automation, the ability to quickly adapt to changing circumstances, as well as ensuring that customers and markets are protected, will be important considerations for all organizations going forward.



Organizational resilience encompasses the broader capability of an organization to navigate and thrive in the face of disruptions. It involves a combination of people, processes, and technologies working together to adapt and bounce back from unexpected events. In the future, it is likely that organizations will prioritise building resilience into their core operations and culture and, indeed, some already are. This includes fostering a flexible workforce, implementing effective risk management strategies, nurturing innovation, and fostering a learning mindset.

The disciplines of BC and resilience have made significant strides in becoming more agile and adaptable in recent years. However, according to interviewees, one aspect that remains - and will continue to be a steadfast cornerstone of effective BC planning for the foreseeable future - is the BIA. The BIA retains its vital role in shaping the overall preparedness and response strategies of organizations. However, the survey shows that many organizations are looking to revise the BIA process. Rather than viewing it as a static exercise, organizations and professionals are recognising the need for a more agile BIA. This shift entails being more attentive to detail and stress-testing the analysis to ensure its accuracy and relevance in dynamic business environments. Practitioners are now taking a more proactive approach to the BIA, recognising that it is not a one-time event but an ongoing process that requires regular review and refinement. They are incorporating iterative methodologies, such as continuous risk assessment and scenario planning, to account for evolving threats and vulnerabilities.

The agility of the BIA process also extends to the involvement of key stakeholders. Organizations are increasingly recognising the importance of engaging employees, business unit leaders, and subject matter experts.

Their firsthand knowledge and expertise contribute to a more comprehensive understanding of critical functions, potential impacts, and recovery requirements. By involving a broader range of perspectives, organizations can improve the accuracy and reliability of the BIA outcomes. One interviewee commented that he believed the BIA was becoming less important and the focus in his organization was understanding the business priorities and critical processes rather than performing an exhaustive impact analysis. Such a position might be subscribed to by other organizations in the financial services sector but, for most, the BIA does remain at the core of BC.

"The importance of the BIA has changed over time. In the past, it was used to cost-justify solutions to the board and educate BC professionals about the business's operations. However, the BIA was often conducted by people who didn't fully understand business needs or operational risks. As the understanding of business and BC professionals' access to the board increased, the need for the traditional BIA diminished. Advancements in technology, such as mirroring, cloud, and hot replication, led to faster IT recovery times, making the impact analysis less relevant. Businesses can now recover IT systems quickly, often before the impact is felt. The focus shifted to understanding business priorities and critical processes rather than exhaustive impact analysis."

Head of operational resilience, insurance sector, United Kingdom

However, two aspects that are deemed the least important to change within the next five years within respondents are treating BC as a mere "tick box" exercise and maintaining premises-focused programmes. Organizations have come to realise that viewing BC as a mere formality undermines its effectiveness and fails to address the dynamic nature of risks and disruptions. An interviewee from Brazil highlighted how they were able to forge ahead of their competition because they had considered BC ten years ago, whereas many of their peers only introduced it when regulation was brought in, treating it as a tick-box exercise. For other professionals, the battle to stop BC being a tick box exercise is still very much underway.

"I think our company is different from the others. They are just doing BC processes because of the regulations, whereas we started to talk about it over 10 years ago. I saw a huge increase of education about resilience after the pandemic in other companies. With my company, I didn't need to do this because we were already had BC in place before the pandemic."

Enterprise risk and business continuity senior manager, health insurance sector, Brazil

"There is no role responsible for assessing resilience at all levels, I have tried to have my role moved from to a management position with two staff, but it hasn't happened. For me as a standalone BCM professional, a single point of failure, I feel like BCM is a tick box exercise. It is disappointing because if these specialties worked more together, that would be more advantageous to have a resilience manager to bring them all together would be fantastic."

Business continuity specialist, healthcare sector, New Zealand

This element also comes to the fore when assessing the BC arrangements of suppliers and partners. Similarly, premises-focused programmes, which primarily focus on physical assets and locations, are no longer sufficient in today's digital and interconnected business landscape.

As organizations increasingly adopt remote work, cloud computing, and virtual infrastructures, the focus must shift towards holistic and adaptable approaches that encompass people, processes, and technology. Organizations today are embracing more comprehensive and forward-thinking strategies for BC and resilience.

This 2023 report shows that the future of BC and resilience will place increasing importance on cross-team collaboration, senior management attention, training and exercising of plans, operational resilience, and organizational resilience. By focusing on these factors, organizations can enhance their preparedness, responsiveness, and ability to thrive in an increasingly dynamic and unpredictable business environment.

"I see the future of resilience and BC as being integrated into a total resilience setup within companies. BC will remain strong, but will be just one element of a broader approach to resilience. This includes inherent strengths and weaknesses of how we do business, as well as specific treatments like BC and disaster recovery. Understanding the connection between all these elements is crucial for a successful resilience strategy. It's important to avoid gaps and ensure a holistic approach where none of these elements stand on their own. The role of the BC manager or head of BC will involve understanding this interconnected value chain and promoting a more holistic approach to resilience."

Senior business resilience design lead, logistics sector, Denmark

Annex



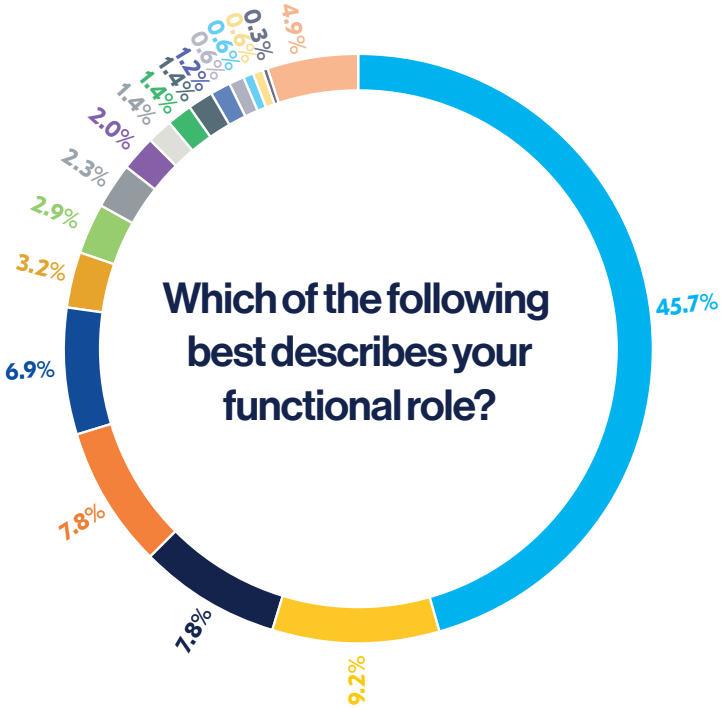


348
Respondents

63
Countries

24
Sectors

10
Respondent Interviews



45.7% BC

9.2% Risk Management

7.8% Operational Resilience

7.8% Organizational Resilience

6.9% IT Disaster Recovery/ IT Service Continuity

3.2% Emergency Planning

2.9% Top management

2.3% Cyber/information security

2.0% Security (physical)

1.4% Health & Safety management

1.4% Crisis management

1.4% Operations

1.2% Quality/Business Improvement

0.6% Supply chain/logistics/ procurement/purchasing

0.6% Internal Audit

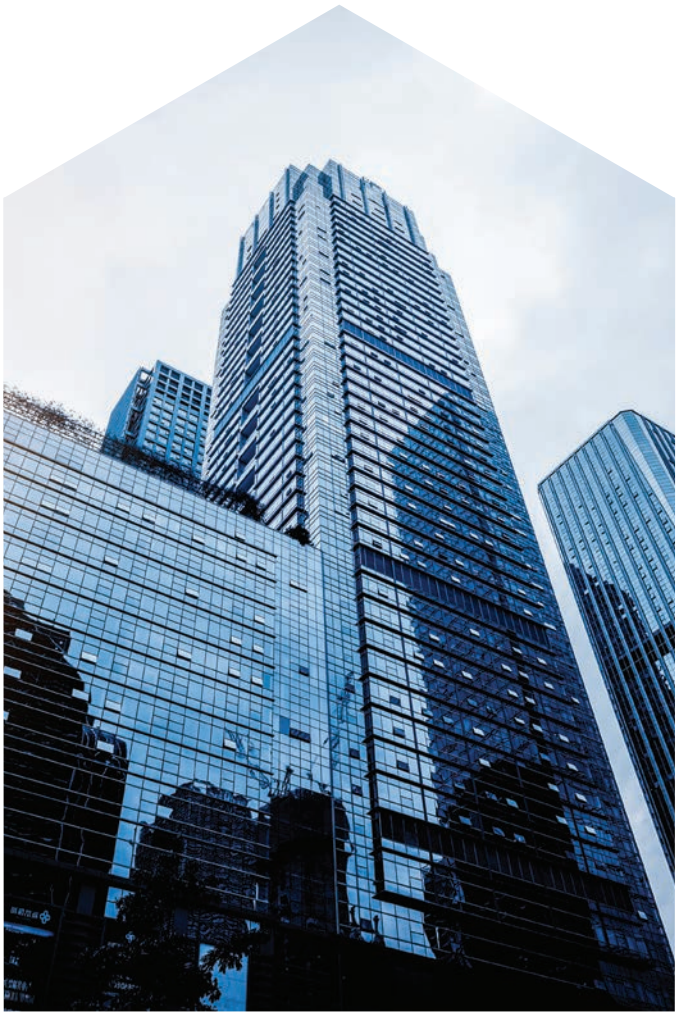
0.6% Marketing

0.3% Human Resources

4.9% Other

Figure 26. Which of the following best describes your functional role?





26.7% Banking and finance

11.2% Public services, government and administration

9.8% Information technology

8.6% Professional services (including consulting)

7.8% Insurance

6.0% Manufacturing

5.8% Education and training

4.3% Energy and utilities

4.0% Healthcare

3.5% Telecommunications

2.0% Transport and logistics

1.7% Aviation

1.4% Emergency services

1.4% Retail and wholesale

0.9% Charity/Not for profit

0.9% Leisure and hospitality

0.9% Real estate and construction

0.9% Science and pharmaceuticals

0.6% Law enforcement and security

0.6% Medical devices

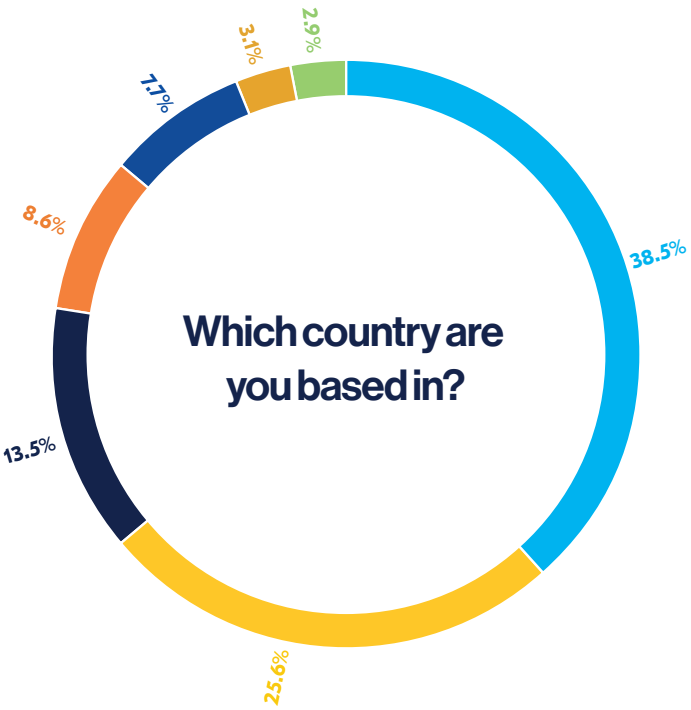
0.3% Consumer goods

0.3% Creative industries

0.3% Engineering and infrastructure

0.3% Environment and agriculture

Figure 27. What sector does your company belong to?



38.5%
Europe

25.6%
North America

13.5%
Africa

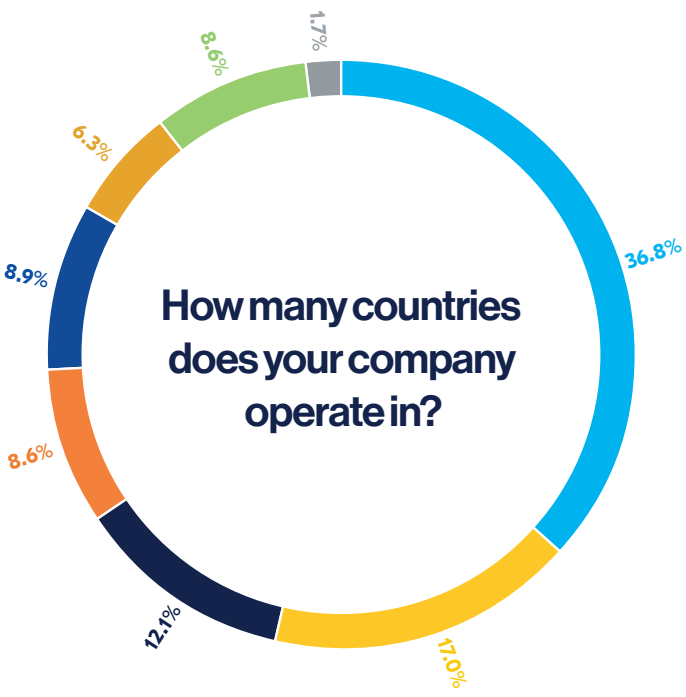
8.6%
Australasia

7.7%
Asia

3.1%
Latin America & the Caribbean

2.9%
Middle East

Figure 28. Which country are you based in?



36.8%
1

17.0%
2-4

12.1%
5-10

8.6%
11-25

8.9%
26-50

6.3%
51-100

8.6%
Over 100

1.7%
Don't know

Figure 29. How many countries does your company operate in?

Approximately how many employees are there in your organization globally?

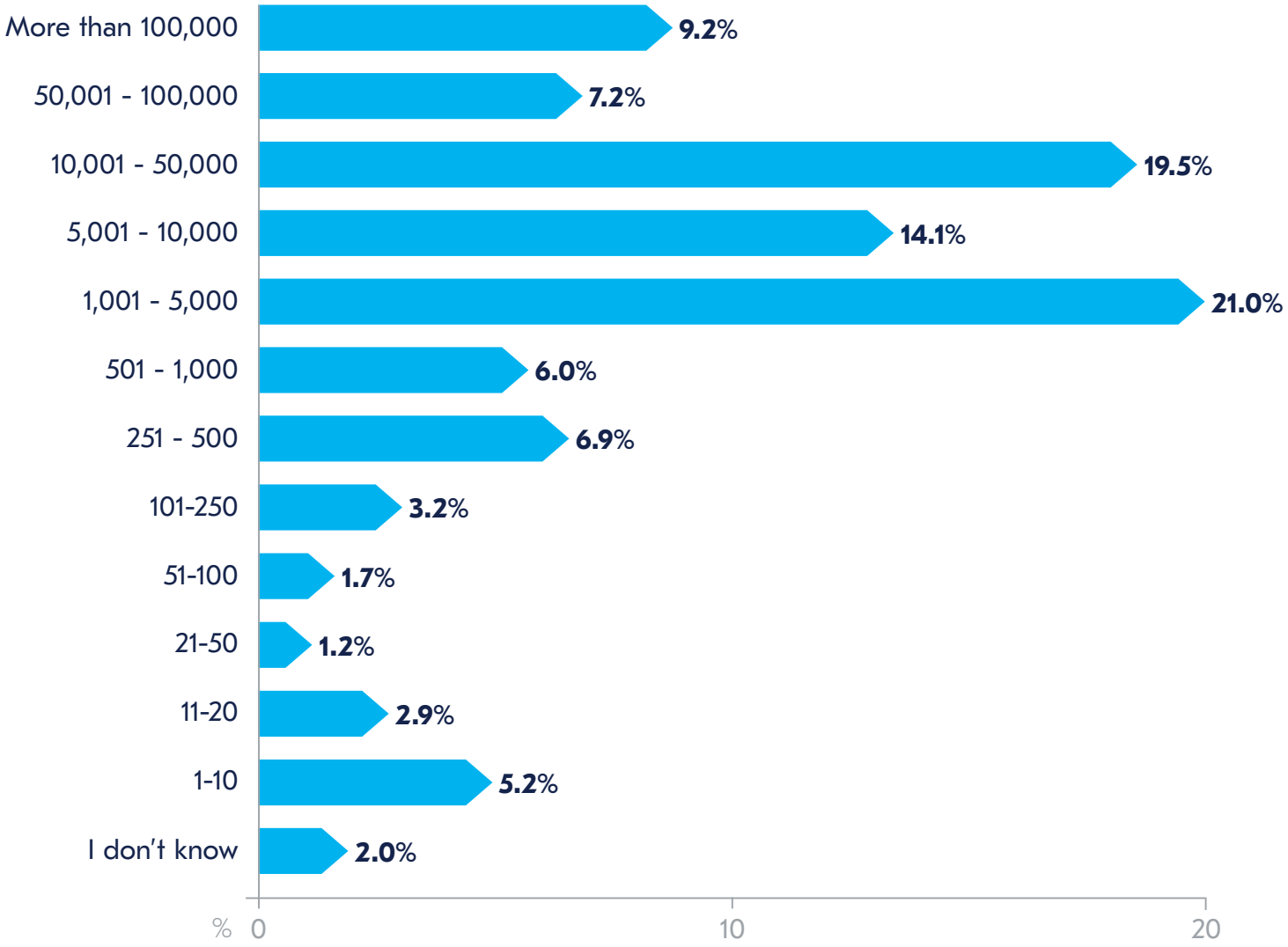


Figure 30. Approximately how many employees are there in your organization globally?

What is the approximate global annual turnover of your organization?

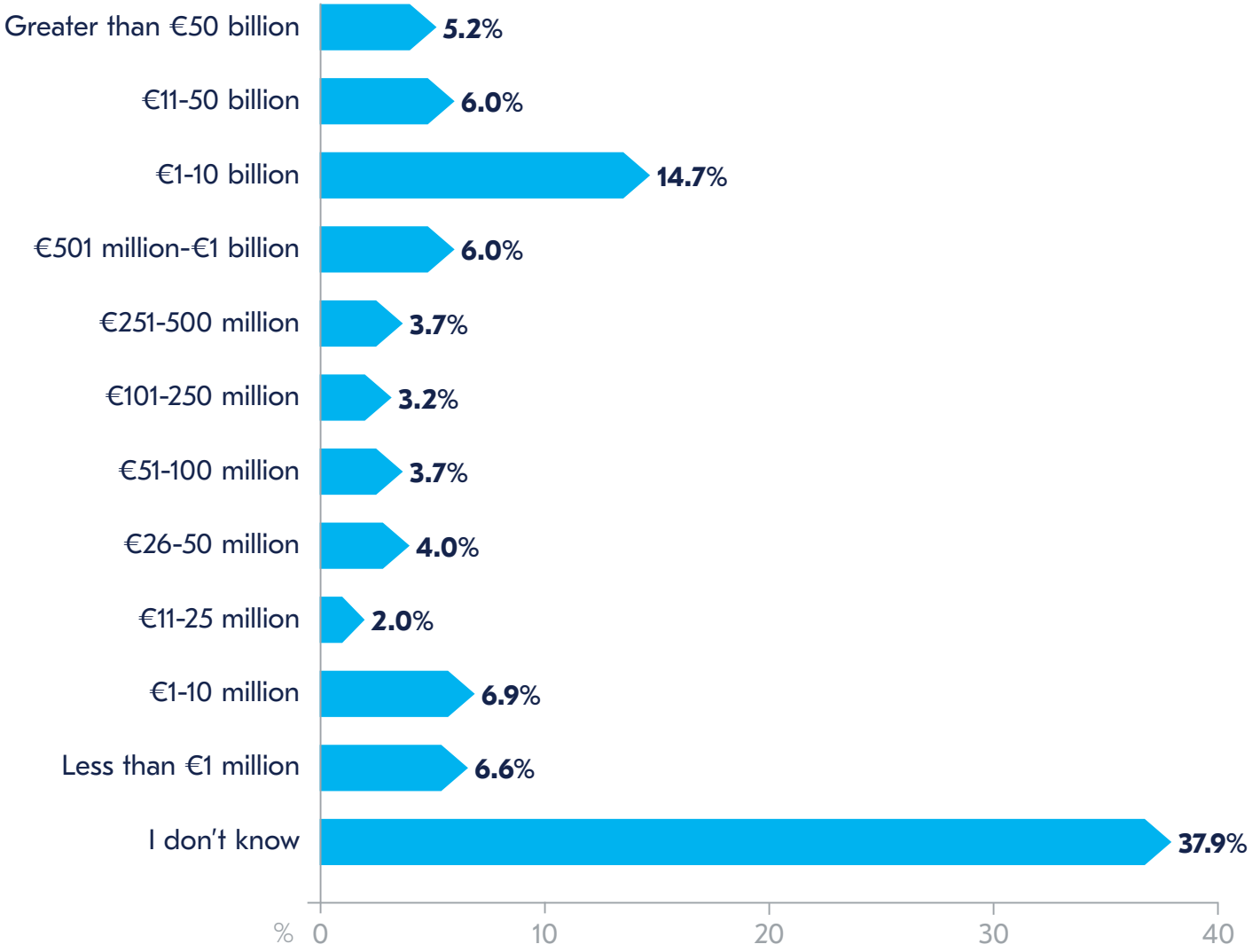


Figure 31. What is the approximate global annual turnover of your organization?

About the Authors



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Rachael has twenty years' experience leading commercial research within organizations such as HSBC, BDO LLP, Marakon Associates, CBRE and BCMS. She has particular expertise in the technology and telecoms, retail, manufacturing and real estate sectors. Her research has been used in Parliament to help develop government industrial strategy and the BDO High Street Sales Tracker, which Rachael was instrumental in developing, is still the UK's primary barometer for tracking high street sales performance. She maintains a keen interest in competitive intelligence and investigative research techniques.

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Maria has over 15 years of experience in academic and market research and has been responsible for the design and implementation of a wide range of policies within public and private organizations such as the Argentine Ministry of Defence, RESDAL, and BMI (Fitch Group). She has served as a policy advisor and political analyst at the Argentine Ministry of Defence and coordinated the Argentine National Security Council's Office. She has particular expertise in geopolitical risk, defence and intelligence and her work has been applied to develop government defence strategies and draft legislation on the matter. Her areas of interest relate to open-source research and how geopolitics impacts resilience within organizations.

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About the BCI

Founded in 1994 with the aim of promoting a more resilient world, The BCI has established itself as the world's leading institute for business continuity and resilience. The BCI has become the membership and certifying organization of choice for Business Continuity and Resilience professionals globally with over 9,000 members in more than 100 countries, working in an estimated 3,000 organizations in the private, public and third sectors. The vast experience of the Institute's broad membership and partner network is built into its world class education, continuing professional development and networking activities. Every year, more than 1,500 people choose BCI training, with options ranging from short awareness raising tools to a full academic qualification, available online and in a classroom. The Institute stands for excellence in the resilience profession and its globally recognised Certified grades provide assurance of technical and professional competency. The BCI offers a wide range of resources for professionals seeking to raise their organization's level of resilience, and its extensive thought leadership and research programme helps drive the industry forward. With approximately 120 Partners worldwide, the BCI Corporate Membership offers organizations the opportunity to work with the BCI in promoting best practice in business continuity and resilience.

The BCI welcomes everyone with an interest in building resilient organizations from newcomers, experienced professionals and organizations. Further information about The BCI is available at **www.thebci.org**.

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Correct as of August 2023

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