GlobalConnect IT Insights:

Future-ready or falling behind?

A reality check for Nordic IT leaders

GlobalConnect

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About the survey

The survey was conducted by Demoskop on behalf of GlobalConnect with 225 participants. The target group consisted of IT Managers and Security Managers at Nordic and/or national level from companies with 150+ employees operating in Sweden, Norway, and Denmark. Data was collected using a mixed-method approach combining qualitative and quantitative insights through phone interviews. A total of 225 phone interviews were conducted (75 per country) during the period of 3rd-20th September 2024.

Preface:

Has it ever been harder to predict the future than it is now?

We are in the midst of a time when digital development is accelerating faster than ever. AI and quantum technology are opening up new possibilities – but also introducing new risks. At the same time, global instability is blurring the line between cybersecurity and physical security. And in a society where almost everything is connected, stable digital infrastructure is becoming as essential as water and electricity.

Against this backdrop, we asked ourselves a simple question: How future-proof is the Scandinavian IT environment?

To find out, we engaged the research firm Demoskop to interview more than 200 IT leaders in Sweden, Norway, and Denmark. In this report, you will find the results as well as reflections from our experts and concrete examples of how different organizations are preparing for what lies ahead.

One figure that stood out to me: as many as one in four IT leaders do not know whether their organization is subject to the NIS2 directive. That is worrying, but also a sign that there are opportunities to use new regulatory demands as leverage to secure the resources that are truly needed.

In the second part of the report, we highlight four trends that address the need for future-proofing. Perhaps some of them are already on your agenda? Or maybe they should be added.

I hope this report provides you with new perspectives, inspiration, and perhaps a few arguments to bring to your leadership team.

Happy reading!

Anna Granö, Executive Vice President
B2B at GlobalConnect

"As many as one in four IT leaders do not know whether their organization is subject to the NIS2 directive"

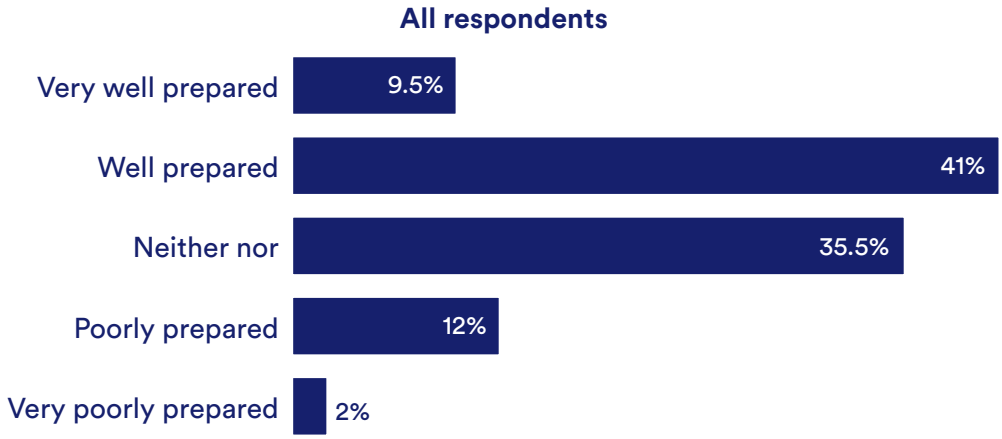
Part 1
How future-ready are today's IT leaders?

One in two are equipped to handle future technological developments

With rapid advancements in technologies like AI, IT departments must handle large volumes of data efficiently. Are today's IT departments ready to scale their infrastructure to capitalize on upcoming breakthroughs?

Half of the IT leaders surveyed say they are well or very well prepared. Sweden shows the highest readiness; Denmark the lowest.

How well prepared is your organization for future developments (e.g. the volume of data required by AI)?



Expert commentary:

"With the exponential growth in data volumes driven by AI, it is essential for organizations to invest in robust data infrastructure. Cloud services and edge computing are becoming increasingly vital for managing and processing large datasets efficiently. As an IT leader, you also need to build a flexible and scalable infrastructure that can adapt to future technological changes. And finally: invest in training and skills development to ensure your team is ready to handle AI technologies."

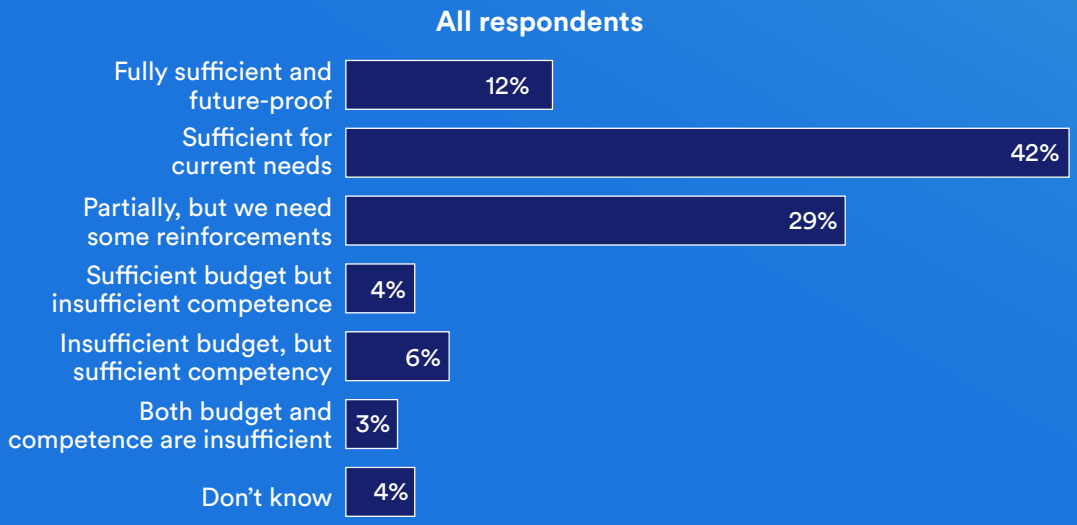
Emma Helton, Security Manager at GlobalConnect

4 in 10 need reinforcements to meet security requirements

Cybersecurity is another highly topical area that is unlikely to diminish in importance in the coming years. So how do IT leaders view their ability to maintain a sufficiently high level of security within their organizations, both today and in the future?

Gaps in budget, internal expertise, or both, prevent a relatively large share of organizations from reaching the security level they believe is necessary. Just over 1 in 10 say they currently have the resources needed to meet both present and future demands. The share is lowest in Sweden (7%) and highest in Denmark (17%). A similar difference is seen between the private and public sectors, where IT leaders in private organizations express more confidence than those in the public sector.

Do you currently have sufficient budget and expertise to maintain the security level your organization requires?



Expert commentary:

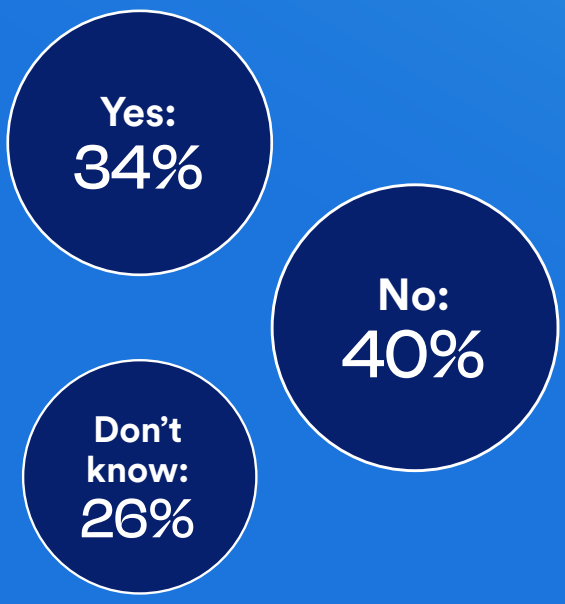
"Historically, IT leaders have found it difficult to gain support for cybersecurity investments. Too many companies have thought, 'attacks happen to others, not us.' Recently, however, cybersecurity has climbed higher on the agenda. This shift is partly driven by geopolitical tensions, but more so by stricter regulations such as the NIS2 directive. Still, the survey reveals a gap, showing that many IT leaders still lack the necessary resources to future-proof their organizations. That is beginning to change, especially with regulations like NIS2 but a lag remains, leaving many without the means to become truly future-proof."

Øystein Snekkerlien, Security Strategist at GlobalConnect

26% don't know if they are covered by the NIS2 directive

The NIS2 directive imposes stricter cybersecurity requirements on a broad range of organizations. Yet, the survey shows it's far from clear who actually needs to comply. More than one in four IT leaders say they don't know whether their organization falls under the directive or not.

Is your organization subject to the NIS2 directive?



What is the NIS2 directive?

The EU directive NIS2[1] was introduced in October 2024 and will be incorporated into each member state's national legislation. The overarching aim is to strengthen cyber resilience across the EU. Organizations covered by the directive must meet strict requirements for cybersecurity and incident reporting. Failure to comply may result in substantial fines.

Expert commentary:

"The fact that so many IT leaders in the survey don't know whether they fall under NIS2 is concerning. Since the directive also affects subcontractors in multiple tiers, there's a good chance most organizations will need to comply. In my view, directives like NIS2, and also DORA, have served as a much-needed wake-up call, pushing companies and organizations to raise the bar for cybersecurity."

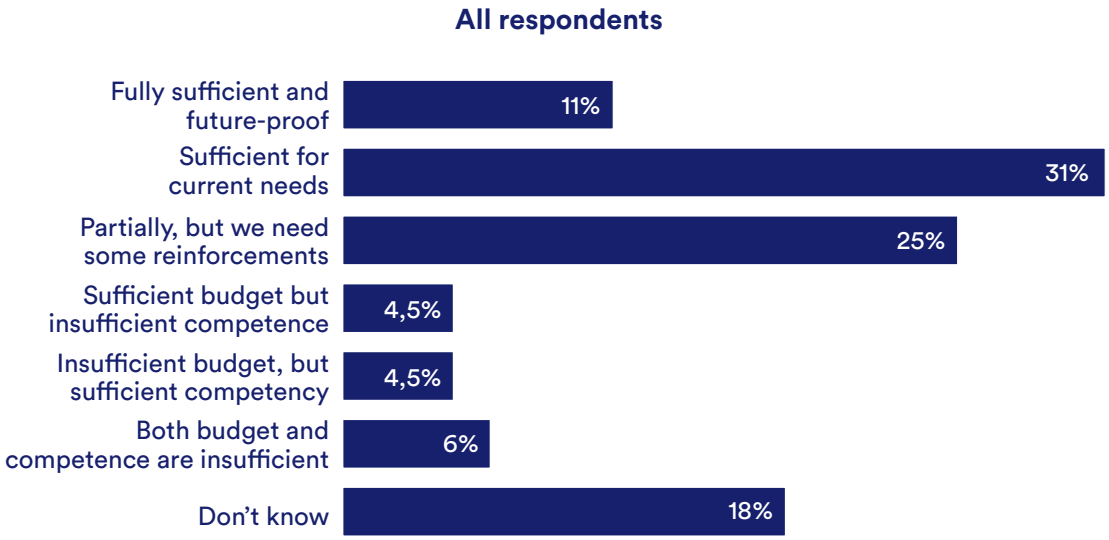
Søren Gjevert Petersen, Head of Security Services at GlobalConnect

[1] https://eur-lex.europa.eu/legal-content/SV/TXT/HTML/?uri=CELEX:32022L2555&from=EN

4 in 10 lack resources for regulatory compliance

The extent of change required to meet the demands of NIS2 and other directives depends on each organization's starting point. However, the need for reinforcement is evident in many cases: 39% of IT leaders report lacking sufficient budget, competence, or both to future-proof their operations in line with regulatory requirements.

Do you have sufficient budget and expertise to meet regulatory compliance such as the NIS2 directive?



Expert commentary:

"The directive emphasizes that security must be an integrated part of IT infrastructure, not something added on later. Much of it comes down to the basics, like lifecycle management and asset classification to ensure each component is protected at the right level. Organizations already familiar with the original NIS directive or certifications like ISO 27000 have a head start with NIS2. Others may face more uncertainty. Regardless of where you're starting from, it is smart to take a long-term view and break the transition down into manageable steps to use resources effectively. External partners can help, but responsibility cannot be outsourced. As an IT leader, you must understand the legislation, together with legal experts, and take ownership of both implementation and ongoing management. These issues require continuous attention. You can't just buy a high-end solution and consider it done."

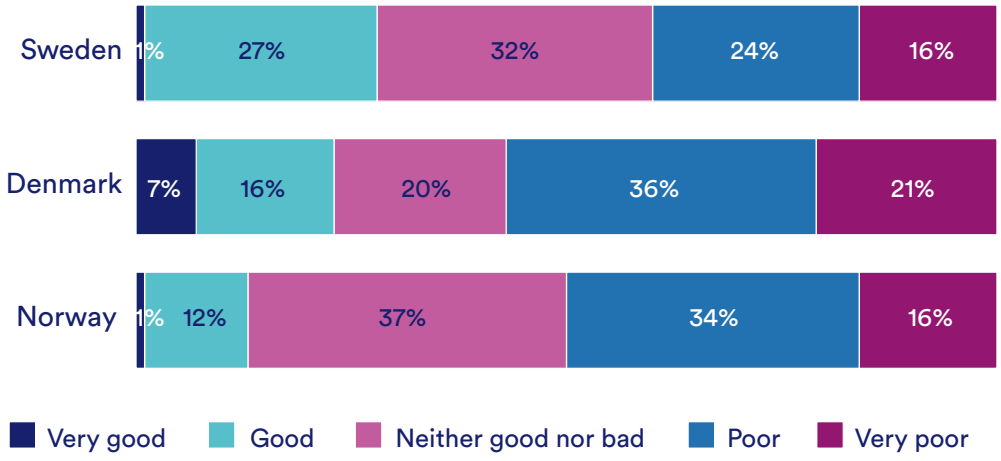
Søren Gjevert Petersen, Head of Security Services at GlobalConnect

Only 1 in 5 have a solid understanding of quantum risks and opportunities

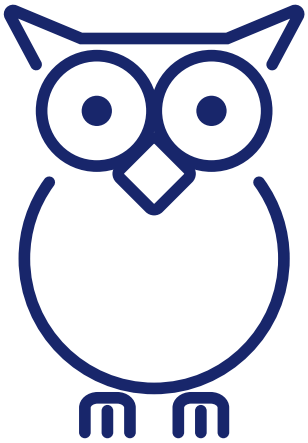
While quantum computing receives less attention than AI and NIS2 at present, its future impact could be significant. The topic of quantum and the looming 'Q Day' doesn't appear to be a high priority for the IT leaders surveyed.

Responses vary moderately across countries, but overall, half of IT leaders report having poor or very poor knowledge of quantum technology's opportunities and risks. Only 20% indicate that they have a good or very good understanding of the threats and possibilities associated with quantum computing.

How good is your knowledge of quantum technology and its opportunities/security risks?



"Half of IT leaders report having poor or very poor knowledge of quantum technology's opportunities and risks."



What is a quantum computer?

A quantum computer uses the principles of quantum mechanics to perform calculations. Unlike classical computers, which operate with bits (0 or 1), quantum computers use so-called quantum bits, or "qubits", which can exist in multiple states simultaneously. This allows certain types of problems, especially in cryptography, simulation, and optimization, to be solved significantly faster than with traditional computers. This brings both opportunities and risks.

What is Q Day?

Many of the solutions used today to keep communication secure and private rely on encryption keys that are too complex for traditional computers to decode within a reasonable time. But in the not-too-distant future, quantum computers are expected to reach the computational capacity required to break these codes quickly and easily. This moment is referred to as Q Day, and it marks the point when commonly used encryption methods, such as RSA, can no longer be considered secure. Many current methods (such as RSA) will no longer be secure.

Expert commentary:

"Q Day is a bit like the turn of the millennium, but without a fixed date. The window of time is constantly shrinking, but there's still an opportunity to act. The most important thing an IT leader can do right now is to gain a clear understanding of their IT environment and data, ensuring everything is well-structured and properly classified. This ensures that the transition to quantum-secure solutions, once they become available, will be significantly faster and smoother."

Martin Højriis Kristensen, Director of Customer Technology at GlobalConnect

Part 2
Trend insights – solutions that support IT leaders' future-proofing efforts

Four trends shaping the future of IT

After reviewing IT leaders' perspectives on future opportunities and challenges - what tools can support their strategies and help them reach their goals? Here, GlobalConnect's experts share insights into emerging IT solutions gaining momentum.

1. Managed IT services

Limited resources remain a recurring challenge among the IT leaders surveyed. One in five respondents say they plan to increase outsourcing of services such as network solutions. This is seen as a strategy to make the use of internal expertise more efficient and value-driven. Today, there is a growing range of managed services available, everything from network solutions like Managed LAN/WAN to security services such as firewalls and SOC (Security Operations Center).

"Cost-efficiency and operational effectiveness are important for today's IT leaders. Many organizations have downsized their IT departments and want their in-house experts to focus on tasks other than network operations. We also see a clear trend toward reducing complexity by limiting the number of vendors and consolidating network and security services with a single partner. This simplifies internal administration while ensuring that solutions are designed to work seamlessly together. The extent and areas of outsourcing vary greatly between organizations. As an IT leader, it is crucial to find the right balance based on the specific conditions of your business."

Johan Thews, Sales Director Large Accounts at GlobalConnect

2. AI-driven network operations and support

A stable connection is already mission-critical for most organizations, and society is only becoming more connected. Forward-thinking network providers are already leveraging AI tools to reduce service disruptions and minimize downtime.

"AI makes it possible to detect and resolve network issues before they impact operations. The entire process, from monitoring performance to ordering spare parts or dispatching a technician, can be handled fully automatically. By continuously analyzing both historical and real-time data, AI tools can also anticipate potential issues and prevent them from occurring altogether."

Marius Grimestrand, Head of Nordic Incident Management at GlobalConnect

3. Cybersecurity integrated into IT infrastructure

A strong defense against various types of intrusions and attacks is increasingly becoming a hygiene factor, even for smaller companies that previously didn't consider themselves targets. This shift is driven by both the growing threat of cybercrime, where AI development gives hackers new, powerful tools, and tightened regulations from authorities, such as the NIS2 and DORA directives.

"We are seeing increased demand for more advanced security services, such as SOCaaS (Security Operations Center). It is also becoming more common for basic protections, like DDoS mitigation, to be embedded into the network services that businesses purchase. More companies are upgrading to SD-WAN, which combines networking and security in a single solution. Cybersecurity is becoming a natural and integral part of digital infrastructure, and no longer something organizations can opt out of. It is a positive shift that benefits everyone."

Søren Gjevert Petersen, Head of Security Services at GlobalConnect

4. Quantum-safe encryption

Alongside the development of quantum computers, intensive efforts are underway to create methods for securing sensitive communications beyond Q Day. Two key approaches are currently in focus. The first is the lattice-based software solution known as PQC (Post-Quantum Cryptography), where the calculations required to break the encryption algorithm are considered too complex even for a quantum computer. The second is QKD (Quantum Key Distribution), a hardware-based method built on the principle of quantum key exchange and the quantum phenomenon of entanglement. This technique is considered unbreakable by quantum computers and can even detect if a third-party attempts to intercept the encrypted communication.

"PQC solutions are already being adopted on a small scale. As an IT leader, it's wise to talk to your network and cybersecurity partners to understand their roadmap toward quantum resilience. The earlier you begin testing, evaluating, and planning to integrate quantum-safe encryption, the better. By being proactive, staying informed, and asking the right questions, you can avoid getting stuck with a solution that becomes insecure and outdated within just a few years."

Søren Henriksen, Quantum Project Manager at GlobalConnect

Conclusion:

Future-proofing IT requires executive-level commitment

How do we summarize what's needed to create a future-proof IT environment? From network monitoring, redundancy, and backup strategies to security solutions that address AI-driven fraud and cyberattacks, the common thread is proactivity.

Staying ahead of the curve can seem like an impossible task in a world that is constantly shifting. However, by adopting a proactive mindset, organizations can build digital infrastructure that is robust, scalable, and secure by design, positioning themselves to handle a wide range of future challenges and opportunities.

A proactive IT strategy doesn't necessarily require investing in new and advanced services; just as critical is getting the basics right. This means working in a structured and continuous way, with processes and routines that have long been considered best practice. But this foundational work is at risk of being deprioritized if the IT department's resources are constantly consumed by firefighting and day-to-day support. To truly future-proof your organization, your IT strategy needs to extend beyond the IT department and be firmly anchored at the executive level. Only then can it receive the long-term prioritization it requires.

About GlobalConnect

GlobalConnect is one of the leading digital infrastructure and data communication providers in the Nordic region, driving more than half of all data traffic in and out of the Nordics. GlobalConnect delivers fiber-based broadband services to more than 830,000 private consumers and end-to-end connectivity solutions to 30,000 B2B customers via its 244,000 kilometer fiber network across Denmark, Norway, Sweden, Germany and Finland. GlobalConnect employs approximately 2,000 people and had a turnover of SEK 7.6 billion in 2023.

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