



THE FUTURE OF THE
DIGITAL ENTERPRISE

Southeast Asia

Key Findings of the Ecosystem
Digital Enterprise Study, 2022

SEPTEMBER 2022





Southeast Asia Emerges as Innovation Leader in Asia Pacific

Southeast Asia has evolved into an innovation hub with Singapore at the centre. The entrepreneurial and startup ecosystem has grown significantly across the region – for example, Indonesia now has the 5th largest number of startups in the world.

Organisations in the region are demonstrating a strong desire for tech-led innovation, innovation in experience delivery, and in evolving their business models to bring innovative products and services to market.

TOP BUSINESS PRIORITIES, 2022-23

41%

**Innovation of
Products/
Services**

34%

**Improving
Customer
Experience**

31%

**Revenue
Growth**

30%

**Identifying New
Business Models/
Revenue Streams**



Data & AI Investments are Closely Linked to Business Outcomes

There is clear evidence of the alignment between technology and business in the region.

Most of the main outcomes expected from data are reflected in the business priorities – innovation, revenue growth and better customer experience. Most countries in the region continue to focus on digital workplace technologies – and on gathering insights on employee preferences to improve their experiences.

MAIN OUTCOMES EXPECTED OF DATA & AI INVESTMENTS



43%
Improving Employee
Experience



40%
Reduction of
Operating Costs



39%
Product Improvement/
Innovation



39%
Increased Customer
Satisfaction



Tech Teams Want Better Control Over Infrastructure

Technology teams are faced with an infrastructure and applications sprawl which will take them a while to reconcile.

Organisations in Southeast Asia are looking to modernise their infrastructure – and this will include a re-evaluation of the cloud strategy across the region and data centre consolidation in countries such as Thailand and Singapore. The aim will be to empower business stakeholders with the data insights required, irrespective of where the data is generated or hosted.

With a better view of how they should manage their infrastructure, organisations will also look to overhaul IT Operations – with an eye on skills shortage.

FOCUS OF TECH MODERNISATION STRATEGY, 2022-23

51%



Infrastructure Modernisation

45%



Data & AI Strategy

43%



IT Operations

Source: Ecosystem Digital Enterprise Study, 2022

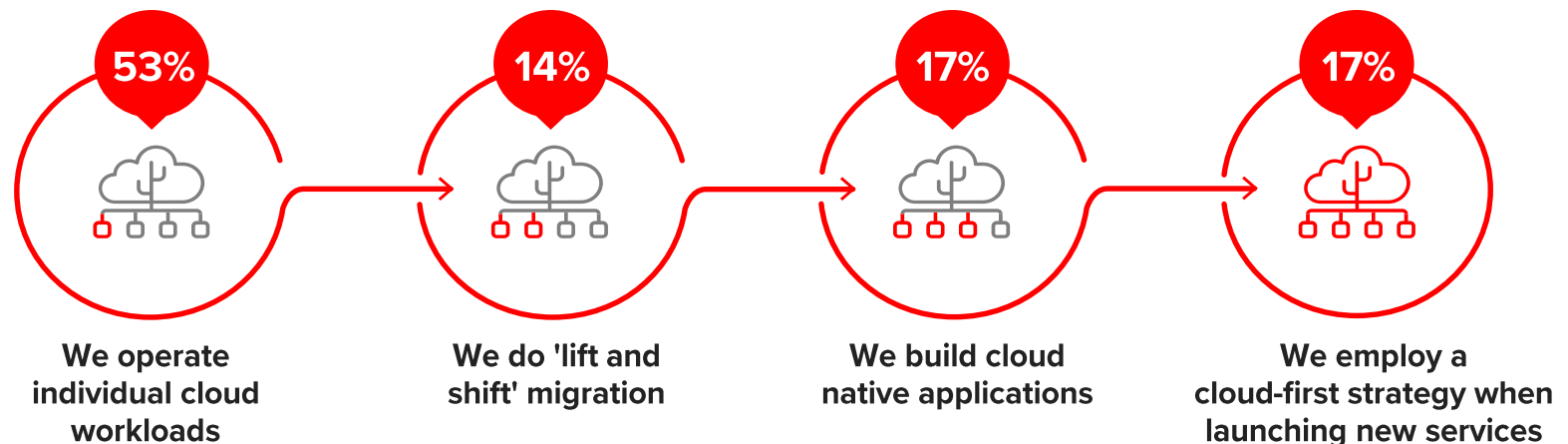


Organisations are Opting for a Hybrid Multicloud Approach

Organisations are not necessarily doing away with a 'cloud first' approach – but they have become more agnostic to where data is hosted.

Organisations with on-prem infrastructure are extending to public cloud; while those that have gone public cloud are looking to integrate it better with on-prem infrastructure. Either way, most organisations in the region are opting for a hybrid multicloud approach, as they want the flexibility to host individual workloads where it makes most business sense.

CLOUD STRATEGY IN SOUTHEAST ASIA



Source: Ecosystem Digital Enterprise Study, 2022



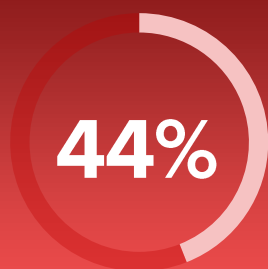
Cybersecurity Underpins Tech Investments

Many organisations in the region do not have the maturity to handle the evolving threat landscape – and they are aware of it.

This awareness is strongest among organisations in Malaysia. Tech decision-makers are skeptical of the management's awareness of cyber risks and think that they lack proper data governance measures.

As organisations build their data strategy, leverage more data, and revamp their enterprise systems for easier access to all-of-organisation data, they will increase their data security and privacy investments.

AREAS WHERE ORGANISATIONS WILL INCREASE INVESTMENTS MOST IN 2022-23



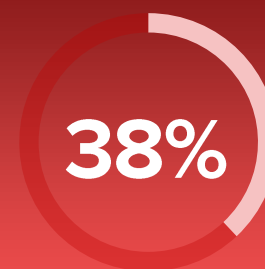
Cybersecurity



Data & AI



Enterprise Software
Upgrades



Mobile
applications

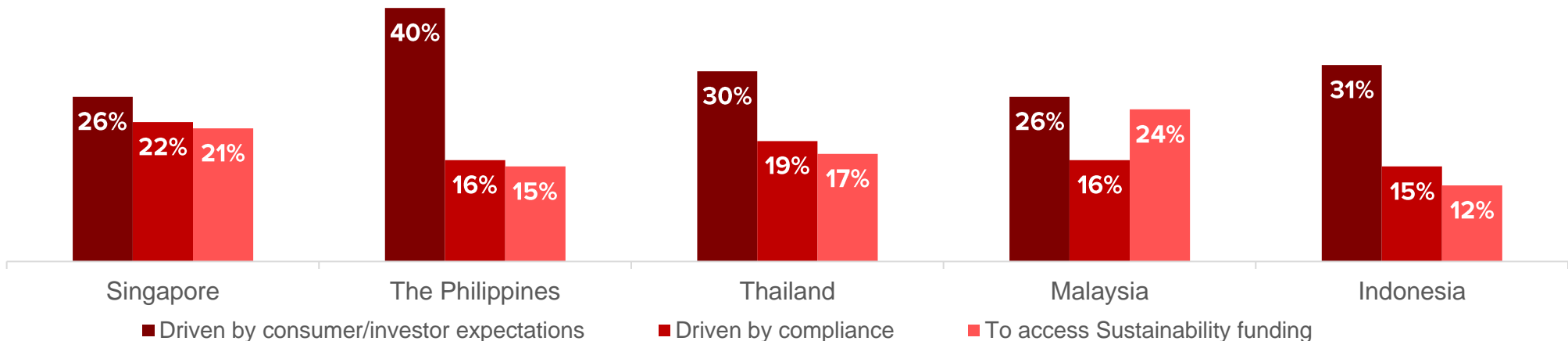


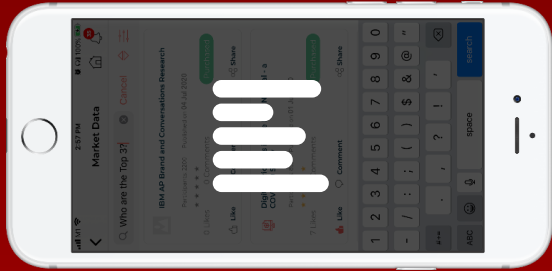
Sustainability is an Emerging Focus Area

77% of large enterprises in Southeast Asia have some Sustainability focus.

While many organisations have not really supported their intentions through well-defined initiatives, their customers – especially millennials and Gen Zs – are driving environmental and social responsibility in organisations; in most cases more than regulations are. This is especially true of the Philippines, Indonesia and Thailand. While organisations in Singapore are more focused on compliance, organisations in Malaysia are most successful in accessing sustainability-related funding.

KEY DRIVERS OF SUSTAINABILITY IN SOUTHEAST ASIA





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