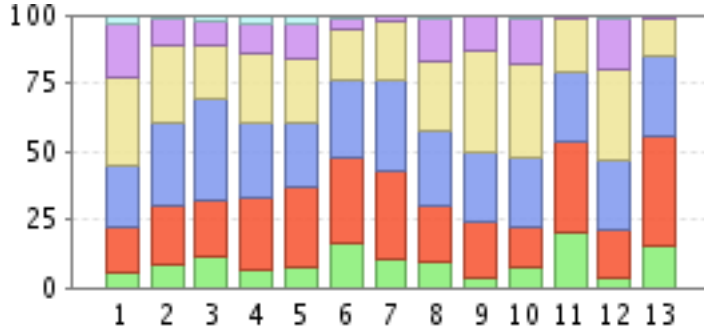


Multi-sponsor quarterly risk briefing business resilience

Final results

22-Jan

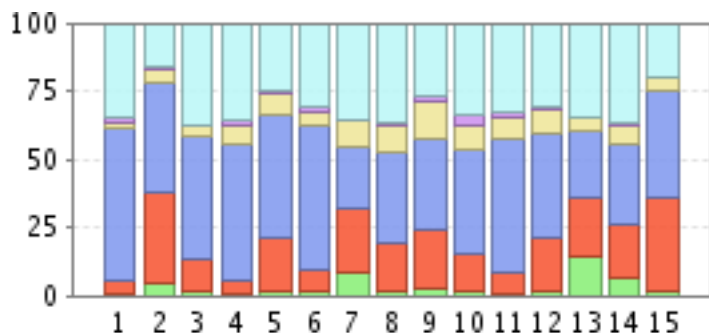
1. How significant a threat do the following risks pose to your company's global business operation today? Rate on a scale of 1 to 5, where 1=Very high risk and 5=Very low risk.



	1	2	3	4	5	Don't know/Not applicable	Mean
1 Financing risk (difficulty raising finance)	5.52% (10)	16.57% (30)	22.65% (41)	32.04% (58)	19.34% (35)	3.87% (7)	3.55
2 Credit risk (risk of bad debt)	8.29% (15)	22.1% (40)	30.39% (55)	28.18% (51)	9.39% (17)	1.66% (3)	3.13
3 Market risk (risk that the market value of assets will fall)	11.11% (20)	21.11% (38)	36.67% (66)	20% (36)	8.33% (15)	2.78% (5)	3.02
4 Foreign exchange risk (risk that exchange rates may worsen)	6.11% (11)	26.67% (48)	27.22% (49)	26.11% (47)	10% (18)	3.89% (7)	3.19
5 Country risk (problems of operating in a particular location)	7.73% (14)	29.28% (53)	23.76% (43)	23.2% (42)	12.15% (22)	3.87% (7)	3.14
6 Regulatory risk (problems caused by new or existing regulations)	16.02% (29)	31.49% (57)	28.73% (52)	18.78% (34)	3.87% (7)	1.1% (2)	2.66
7 IT risk (eg, loss of data, outage of data centre)	10.56% (19)	32.22% (58)	32.78% (59)	22.22% (40)	2.22% (4)	0% (0)	2.73
8 Political risk (danger of a change of government)	8.89% (16)	20.56% (37)	28.33% (51)	25.56% (46)	15% (27)	1.67% (3)	3.22
9 Crime and physical security	3.87% (7)	19.89% (36)	25.41% (46)	37.57% (68)	12.71% (23)	0.55% (1)	3.37
10 Terrorism	7.78% (14)	14.44% (26)	25% (45)	35% (63)	16.67% (30)	1.11% (2)	3.42
11 Reputational risk (eg, events that undermine public trust in your products or brand)	20.44% (37)	32.6% (59)	25.97% (47)	19.89% (36)	1.1% (2)	0% (0)	2.49
12 Natural hazard risk (eg, hurricanes, earthquakes)	3.31% (6)	17.68% (32)	25.41% (46)	33.15% (60)	19.34% (35)	1.1% (2)	3.51
13 Human capital risks (eg, skills shortages, succession issues, loss of key personnel)	15% (27)	40.56% (73)	29.44% (53)	13.33% (24)	1.67% (3)	0% (0)	2.46

Response: 181

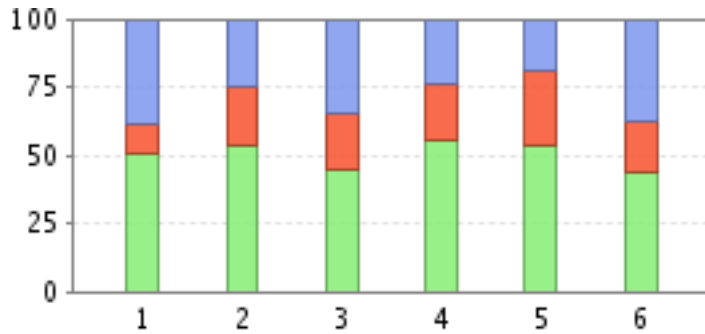
2. How has your organisation's assessment of risk in each of the following countries and regions changed over the last three months?



	Significant increase in risk	Slight increase in risk	No change	Slight decrease in risk	Significant decrease in risk	Don't know/Not applicable	Mean
1 Canada	0.56% (1)	4.47% (8)	55.87% (100)	2.79% (5)	1.68% (3)	34.64% (62)	4.04
2 US	4.47% (8)	32.96% (59)	40.78% (73)	4.47% (8)	1.12% (2)	16.2% (29)	3.13
3 France	1.12% (2)	12.36% (22)	44.38% (79)	3.93% (7)	0.56% (1)	37.64% (67)	4.03
4 Germany	0.56% (1)	5.08% (9)	49.72% (88)	7.34% (13)	1.13% (2)	36.16% (64)	4.12
5 UK	1.12% (2)	19.66% (35)	45.51% (81)	7.87% (14)	1.12% (2)	24.72% (44)	3.62
6 Other Western Europe	1.12% (2)	8.38% (15)	53.07% (95)	5.03% (9)	1.68% (3)	30.73% (55)	3.9
7 Russia	8.43% (15)	23.03% (41)	23.03% (41)	9.55% (17)	0.56% (1)	35.39% (63)	3.77
8 Other Eastern Europe	1.68% (3)	17.88% (32)	32.96% (59)	10.06% (18)	1.12% (2)	36.31% (65)	4
9 China	2.78% (5)	21.67% (39)	33.33% (60)	13.33% (24)	2.22% (4)	26.67% (48)	3.71
10 India	1.68% (3)	13.41% (24)	37.99% (68)	9.5% (17)	3.35% (6)	34.08% (61)	4.02
11 Japan	0.58% (1)	8.09% (14)	49.13% (85)	7.51% (13)	1.73% (3)	32.95% (57)	4.01
12 Rest of Asia-Pacific	1.68% (3)	19.55% (35)	38.55% (69)	8.38% (15)	1.12% (2)	30.73% (55)	3.8
13 Middle East	14.04% (25)	21.91% (39)	24.16% (43)	5.06% (9)	0% (0)	34.83% (62)	3.6
14 Latin America	6.18% (11)	19.66% (35)	29.78% (53)	6.18% (11)	1.12% (2)	37.08% (66)	3.88
15 Overall global risk	1.69% (3)	34.27% (61)	39.33% (70)	5.06% (9)	0% (0)	19.66% (35)	3.26

Response: 181

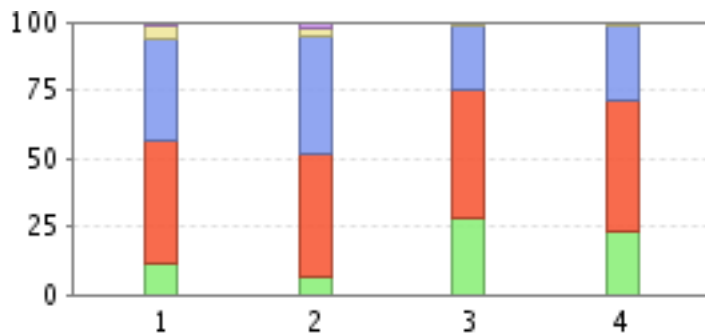
3. In each of the following regions, are the majority of risks to your business considered to be general (eg, likely to affect many other companies operating in the same location or industry) or specific (eg, relating to your company's internal systems, processes or people)?



	General	Specific	Not applicable/Don't know	Mean
1 Africa/Middle East	50.28% (89)	11.3% (20)	38.42% (68)	1.88
2 Asia Pacific	53.93% (96)	21.35% (38)	24.72% (44)	1.71
3 Eastern Europe	44.25% (77)	20.69% (36)	35.06% (61)	1.91
4 Western Europe	55.06% (98)	21.35% (38)	23.6% (42)	1.69
5 North America	53.67% (95)	27.12% (48)	19.21% (34)	1.66
6 Latin America	43.5% (77)	18.64% (33)	37.85% (67)	1.94

Response: 181

4. In the past three years, what change has there been to the number and severity of threats that the organisation faces, and what change has there been to the attention and resources devoted to operational risk and business continuity management?

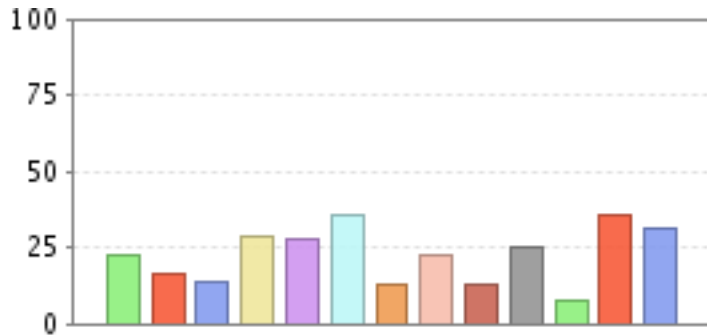


	Increased substantially	Increased slightly	Stayed the same	Decreased slightly	Decreased substantially	Mean
1 Severity of threats the organisation faces	11.67% (21)	44.44% (80)	37.22% (67)	5.56% (10)	1.11% (2)	2.4
2 Volume of threats the organisation faces	6.67% (12)	45% (81)	42.78% (77)	3.33% (6)	2.22% (4)	2.49
3 Attention and resources devoted to operational risk management	27.62% (50)	46.96% (85)	24.31% (44)	1.1% (2)	0% (0)	1.99
4 Attention and resources devoted to business continuity management	22.78% (41)	48.33% (87)	27.22% (49)	1.67% (3)	0% (0)	2.08

Response: 181

5. Which of the following types of threats are seen to be most important in your organisation's consideration of operational risk management planning?

Select up to three responses.

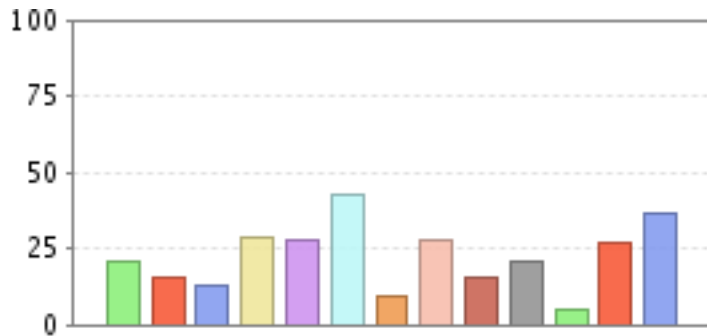


1 - Natural disasters, such as fires or floods	22.47% (40)	2 - Terrorism	16.29% (29)
3 - Power outage	13.48% (24)	4 - Supply chain disruption	28.65% (51)
5 - Virus, worm or other malicious attack on IT systems	27.53% (49)	6 - Loss of data	35.96% (64)
7 - Pandemic	12.92% (23)	8 - Unplanned downtime of online systems	22.47% (40)
9 - Application failure	12.36% (22)	10 - Employee malfeasance (eg, theft or fraud)	25.28% (45)
11 - Industrial action	7.87% (14)	12 - Human error	35.39% (63)
13 - Systems failure	31.46% (56)		

Response: 178

6. Which of the following types of threats receive most attention in your organisation's consideration of operational risk?

Select up to three responses.



1 - Natural disasters, such as fires or floods	20.56% (37)	2 - Terrorism	15% (27)
3 - Power outage	12.78% (23)	4 - Supply chain disruption	28.89% (52)
5 - Virus, worm or other malicious attack on IT systems	27.78% (50)	6 - Loss of data	42.78% (77)
7 - Pandemic	9.44% (17)	8 - Unplanned downtime of online systems	27.22% (49)
9 - Application failure	15% (27)	10 - Employee malfeasance (eg, theft or fraud)	20.56% (37)
11 - Industrial action	5% (9)	12 - Human error	26.67% (48)
13 - Systems failure	36.67% (66)		

Response: 180

7. Who is primarily responsible for operational risk in your organisation?



1 - Chief executive officer	18.44% (33)	2 - Chief information officer	3.35% (6)
3 - Chief financial officer	8.94% (16)	4 - Risk committee	17.32% (31)
5 - Chief risk officer	16.76% (30)	6 - Chief operating officer	11.17% (20)
7 - Line manager or administrator	7.26% (13)	8 - Compliance officer	0.56% (1)
9 - An external provider	0.56% (1)	10 - Head of business continuity	1.68% (3)
11 - No one has overall responsibility	7.82% (14)	12 - Don't know	1.12% (2)
13 - Other, please specify	5.03% (9)		

Mean: 5.14

Response: 179

8. Who is primarily responsible for business continuity planning in your organisation?

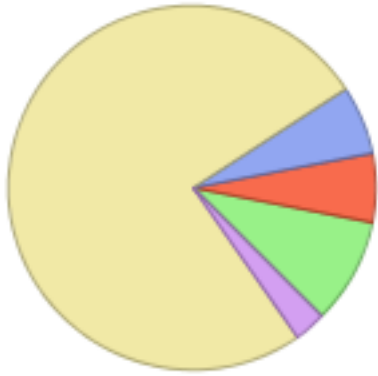


1 - Chief executive officer	21.79% (39)	2 - Chief information officer	11.17% (20)
3 - Chief financial officer	7.26% (13)	4 - Risk committee	8.38% (15)
5 - Chief risk officer	9.5% (17)	6 - Chief operating officer	13.41% (24)
7 - Line manager or administrator	7.26% (13)	8 - Compliance officer	1.12% (2)
9 - An external provider	0.56% (1)	10 - Head of business continuity	4.47% (8)
11 - No one has overall responsibility	11.17% (20)	12 - Don't know	0.56% (1)
13 - Other, please specify	3.35% (6)		

Mean: 5.1

Response: 179

9. Which of the following statements best describes your organisation's approach to operational risk planning?



1 - We see operational risk primarily as an IT issue	9.44% (17)	2 - We see operational risk primarily as an HR issue	6.11% (11)
3 - We see operational risk primarily as an issue for the IT and HR departments	6.11% (11)	4 - We see operational risk as an issue that should involve all business units, not just IT and HR	75.56% (136)
5 - We do not have any operational risk plans	2.78% (5)		

Mean: 3.56

Response: 180

10. Which of the following statements best describes your organisation's approach to business continuity planning?



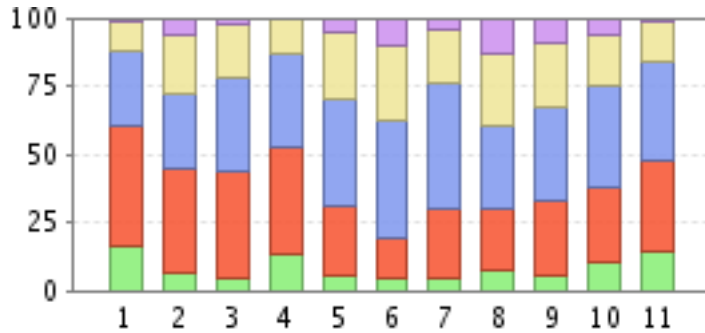
1 - We see business continuity planning primarily as an IT issue	13.41% (24)	2 - We see business continuity planning primarily as an HR issue	6.15% (11)
3 - We see business continuity planning primarily as an issue for the IT and HR departments	7.82% (14)	4 - We see business continuity planning as an issue that should involve all business units, not just IT and HR	69.27% (124)
5 - We do not have any business continuity plans	3.35% (6)		

Mean: 3.43

Response: 179

11. How successfully do you think your organisation manages the following aspects of operational risk?

Rate on a scale of 1 to 5, where 1=Very successfully and 5=Not at all successfully.

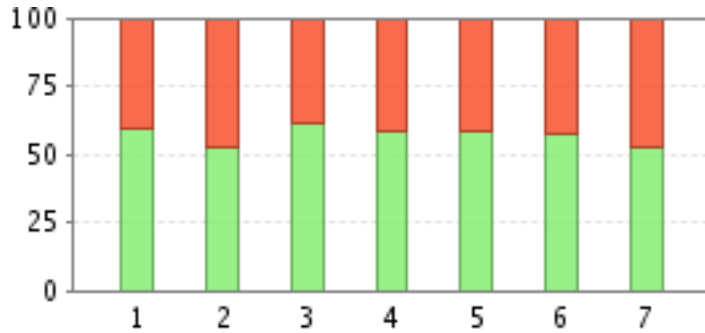


	1	2	3	4	5	Mean
1 Risk assessment	16.67% (30)	43.89% (79)	27.22% (49)	11.11% (20)	1.11% (2)	2.36
2 Risk quantification	6.11% (11)	38.89% (70)	26.67% (48)	21.67% (39)	6.67% (12)	2.84
3 Business impact analysis	4.44% (8)	38.89% (70)	35% (63)	18.89% (34)	2.78% (5)	2.77
4 Reporting on key risks to board	13.33% (24)	39.44% (71)	33.89% (61)	13.33% (24)	0% (0)	2.47
5 Communicating plans with employees	5.03% (9)	26.26% (47)	38.55% (69)	25.14% (45)	5.03% (9)	2.99
6 Communicating plans with extended enterprise	4.44% (8)	15% (27)	42.78% (77)	27.78% (50)	10% (18)	3.24
7 Juggling the requirements and priorities of different business units	4.49% (8)	25.28% (45)	46.07% (82)	19.66% (35)	4.49% (8)	2.94
8 Actively testing business continuity plans	7.22% (13)	22.78% (41)	30.56% (55)	26.11% (47)	13.33% (24)	3.16
9 Regularly updating business continuity plans	5.06% (9)	28.09% (50)	33.71% (60)	23.6% (42)	9.55% (17)	3.04
10 Assigning roles and responsibilities for business continuity	10.06% (18)	27.37% (49)	37.99% (68)	17.88% (32)	6.7% (12)	2.84
11 Obtaining management support (including budgetary)	14.53% (26)	33.52% (60)	35.75% (64)	14.53% (26)	1.68% (3)	2.55

Response: 180

12. How often do you update and actively test your business continuity and disaster recovery plans?

Please select one in each column only.

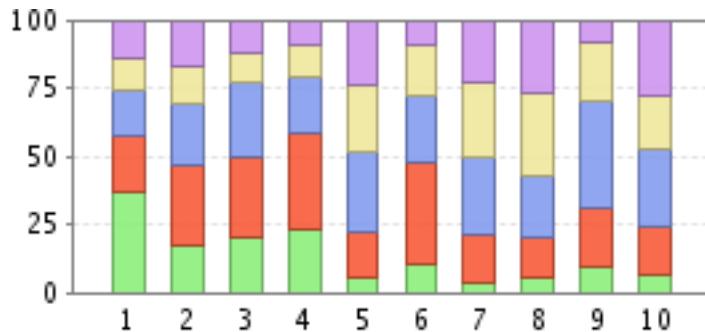


	Update	Test
1 More than once a year	59.09% (52)	40.91% (36)
2 Once a year	52.08% (75)	47.92% (69)
3 Once every two years	61.54% (32)	38.46% (20)
4 Once every three to five years	58.33% (21)	41.67% (15)
5 Less than every five years	57.89% (11)	42.11% (8)
6 We see business continuity planning and disaster recovery as a one-off exercise	57.14% (20)	42.86% (15)
7 We do not have any business continuity or disaster recovery plans	52.94% (18)	47.06% (16)

Response: 180

13. How significant is the influence that the following external organisations have over your decisions about business continuity planning?

Rate on a scale of 1 to 5, where 1=Very significant and 5=Not at all significant.

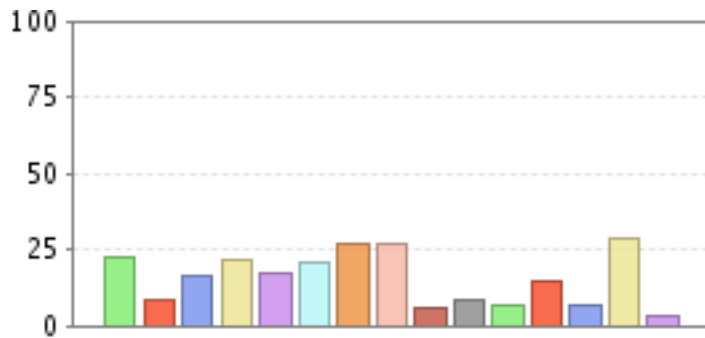


	1	2	3	4	5	Mean
1 Regulators	36.67% (66)	20.56% (37)	17.22% (31)	11.67% (21)	13.89% (25)	2.46
2 Governments	17.42% (31)	29.21% (52)	22.47% (40)	13.48% (24)	17.42% (31)	2.84
3 Shareholders	20.56% (37)	29.44% (53)	26.67% (48)	11.11% (20)	12.22% (22)	2.65
4 Customers	23.16% (41)	35.59% (63)	20.34% (36)	11.86% (21)	9.04% (16)	2.48
5 The media	5.08% (9)	16.95% (30)	29.38% (52)	24.86% (44)	23.73% (42)	3.45
6 Auditors	10.61% (19)	37.43% (67)	24.02% (43)	18.44% (33)	9.5% (17)	2.79
7 Emergency services	3.95% (7)	17.51% (31)	27.68% (49)	27.68% (49)	23.16% (41)	3.49
8 Business continuity or security vendors	5.08% (9)	14.69% (26)	23.16% (41)	30.51% (54)	26.55% (47)	3.59
9 Insurance companies	9.6% (17)	21.47% (38)	38.98% (69)	21.47% (38)	8.47% (15)	2.98
10 Risk consultants	6.82% (12)	17.05% (30)	28.98% (51)	18.75% (33)	28.41% (50)	3.45

Response: 181

14. In the past year, which of the following incidents has caused you to put into action your business continuity plans?

Please select all that apply.

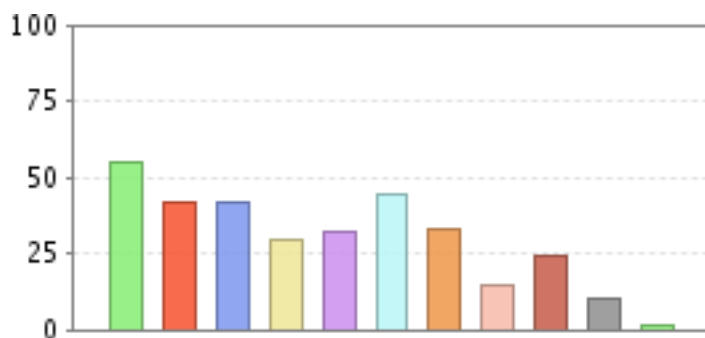


1 - Attack from virus or worm	22.73% (40)	2 - Attack from hacker	7.95% (14)
3 - Data loss	15.91% (28)	4 - Application failure	21.59% (38)
5 - Problem/failure caused by external vendor	17.05% (30)	6 - Supply chain disruption	21.02% (37)
7 - Power outage	26.7% (47)	8 - Unplanned downtime of online systems	26.7% (47)
9 - Industrial action	5.68% (10)	10 - Theft or fraud	7.95% (14)
11 - Act of terrorism	6.82% (12)	12 - Flood or fire	14.77% (26)
13 - Transport failure	6.82% (12)	14 - None of the above	28.41% (50)
15 - Other, please specify	3.41% (6)		

Response: 176

15. Which of the following methods does your organisation use to develop and test its business continuity plans?

Please select all that apply.



1 - Scenario planning	55.25% (100)	2 - Simulations or active testing of plans	41.99% (76)
3 - Specialist training of employees (e.g. crisis management)	41.99% (76)	4 - Use of third party to evaluate business continuity plan	29.28% (53)
5 - Regular communication of plans and procedures with employees	32.04% (58)	6 - Compliance with standards	44.75% (81)
7 - Contract with managed service provider to supply data back-up and alternative premises	32.6% (59)	8 - Contract with third party to audit business continuity plans	14.36% (26)
9 - Purchase of business interruption insurance	24.31% (44)	10 - None of the above	9.94% (18)
11 - Other, please specify	1.1% (2)		

Response: 181

16. How long could your organisation last before downtime of IT systems becomes an issue that could jeopardise the entire company?



1 - Less than four hours	12.85% (23)	2 - Between four hours and 12 hours	19.55% (35)
3 - Between 12 hours and 24 hours	13.97% (25)	4 - Between one day and one week	31.84% (57)
5 - Between one week and one month	11.73% (21)	6 - More than one month	3.91% (7)
7 - Don't know	6.15% (11)		

Mean: 3.46

Response: 179

17. What do you see as being the biggest threat arising from poor business continuity planning?

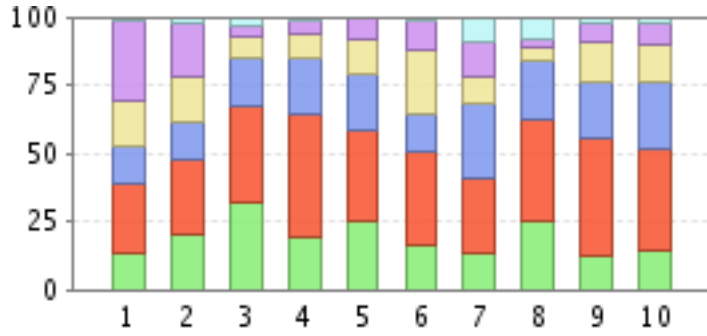


1 - Loss of revenue	19.44% (35)	2 - Reputational damage	43.33% (78)
3 - Loss of data	10% (18)	4 - Defection of customers	16.11% (29)
5 - Defection of suppliers	1.11% (2)	6 - Higher insurance costs	0.56% (1)
7 - Decline in shareholder value	5.56% (10)	8 - Failure to protect employees	3.89% (7)

Mean: 2.79

Response: 180

18. Please indicate whether you agree or disagree with the following statements:



	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	Don't know	Mean
1 Operational risk, disaster recovery and business continuity planning are seen as separate disciplines in our organisation	13.33% (24)	25.56% (46)	13.33% (24)	16.67% (30)	30% (54)	1.11% (2)	3.28
2 We prefer not to outsource critical business continuity practices such as data back-up	20.56% (37)	27.22% (49)	13.89% (25)	16.67% (30)	19.44% (35)	2.22% (4)	2.94
3 Active testing of business continuity plans using mock scenarios is essential to ensure confidence in our planning	31.67% (57)	35.56% (64)	17.78% (32)	7.22% (13)	4.44% (8)	3.33% (6)	2.27
4 Our consideration of business continuity has provided useful insight into broader operational and strategic issues	19.55% (35)	44.69% (80)	20.11% (36)	9.5% (17)	4.47% (8)	1.68% (3)	2.4
5 Business continuity planning is taken seriously and given significant attention by the board	25.41% (46)	32.6% (59)	20.44% (37)	13.26% (24)	7.73% (14)	0.55% (1)	2.47
6 There is never enough budget or resources to ensure really effective business continuity planning	16.57% (30)	33.7% (61)	14.36% (26)	22.65% (41)	11.05% (20)	1.66% (3)	2.83
7 The CRO tends to delegate IT risk to the CIO	13.33% (24)	27.78% (50)	26.67% (48)	10.56% (19)	12.22% (22)	9.44% (17)	3.09
8 The CRO should be involved in decisions regarding IT Service delivery	25.28% (45)	37.08% (66)	21.35% (38)	5.06% (9)	2.81% (5)	8.43% (15)	2.48
9 Our company conducts a systematic assessment as to how operational risk components relate to IT	12.36% (22)	43.26% (77)	20.22% (36)	14.61% (26)	7.3% (13)	2.25% (4)	2.68
10 Outsourcing IT to suppliers with greater levels of experience and skills in resilient systems can help reduce our operational risk	14.44% (26)	37.22% (67)	24.44% (44)	13.89% (25)	7.78% (14)	2.22% (4)	2.7

Response: 181

In which region are you personally based?



1 - Asia-Pacific	27.78% (50)	2 - Latin America	5.56% (10)
3 - North America	28.89% (52)	4 - Eastern Europe	5.56% (10)
5 - Western Europe	26.67% (48)	6 - Middle East & Africa	5.56% (10)

Mean: 3.14

Response: 180

What is your primary industry?



1 - Aerospace/Defence	1.66% (3)	2 - Agriculture and agribusiness	2.76% (5)
3 - Automotive	0.55% (1)	4 - Chemicals	2.21% (4)
5 - Construction and real estate	2.76% (5)	6 - Consumer goods	2.76% (5)
7 - Education	2.76% (5)	8 - Energy and natural resources	9.39% (17)
9 - Entertainment, media and publishing	3.87% (7)	10 - Financial services	33.7% (61)
11 - Government/Public sector	6.63% (12)	12 - Healthcare, pharmaceuticals and biotechnology	4.42% (8)
13 - IT and technology	6.63% (12)	14 - Logistics and distribution	1.66% (3)
15 - Manufacturing	4.42% (8)	16 - Professional services	9.39% (17)
17 - Retailing	1.1% (2)	18 - Telecommunications	1.1% (2)
19 - Transportation, travel and tourism	2.21% (4)		

Mean: 10.47

Response: 181

What are your organisation's global annual revenues in US dollars?



1 - \$500m or less	34.27% (61)	2 - \$500m to \$1bn	17.42% (31)
3 - \$1bn to \$5bn	20.22% (36)	4 - \$5bn to \$10bn	10.11% (18)
5 - \$10bn or more	17.98% (32)		

Mean: 2.6

Response: 178

Which of the following best describes your title?

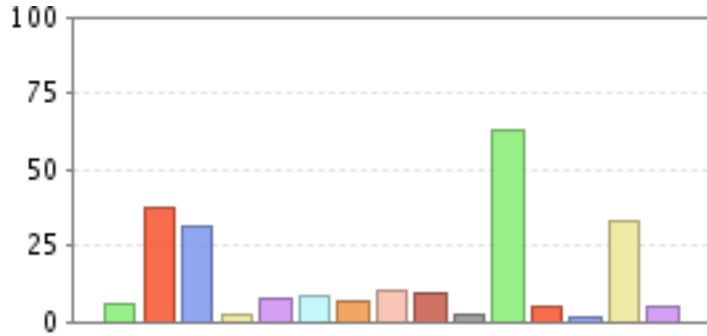


1 - Board member	4.97% (9)	2 - CEO/President/Managing director	17.13% (31)
3 - CFO/Treasurer/Comptroller	15.47% (28)	4 - CIO/Technology director	2.21% (4)
5 - Other C-level executive	26.52% (48)	6 - SVP/VP/Director	14.92% (27)
7 - Head of Business Unit	5.52% (10)	8 - Head of Department	11.05% (20)
9 - Manager	2.21% (4)	10 - Other	0% (0)

Mean: 4.64

Response: 181

What are your main functional roles? Please choose no more than three functions.



1 - Customer service	5.59% (10)	2 - Finance	36.87% (66)
3 - General management	30.73% (55)	4 - Human resources	2.23% (4)
5 - Information and research	7.82% (14)	6 - IT	8.38% (15)
7 - Legal	6.7% (12)	8 - Marketing and sales	10.06% (18)
9 - Operations and production	9.5% (17)	10 - Procurement	2.23% (4)
11 - Risk	62.57% (112)	12 - R&D	4.47% (8)
13 - Supply-chain management	1.12% (2)	14 - Strategy and business development	32.96% (59)
15 - Other	4.47% (8)		

Response: 179

Do you have responsibility for, or influence over, strategic decisions on risk management in your company?



1 - Yes	100% (181)	2 - No	0% (0)
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Mean: 1

Response: 181

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