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BCI Continuity and Resilience Report 2024



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Foreword

Welcome to the 2024 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 Riskconnect for their continued sponsorship of this report.

2024 has been marked by a number of headlines this year: the CrowdStrike outage in July was unproudly named as the 'biggest outage ever', while the 'super year' of elections is seeing civil unrest reach all corners of the globe. However, one of the major findings of the report this year is the bedding down of 'resilience' and 'business continuity' in organizations, and how — if at all — the two are separated. The trends of previous years have seen somewhat of a reversal: pure business continuity is retuning its focus on the operational side of resilience, while 'resilience' departments (albeit business, operational, or organizational resilience) are becoming commonplace in organizations. These departments tend to have a more strategic, proactive view of resilience, but have strong, defined links with business continuity departments to provide the organization with a truly holistic state of resilience.

Part of this change is driven by changing attitudes from senior management and the c-suite. Members are saying that they typically have shorter reporting lines to the board, while 4 in 10 now have a dedicated person — whether that be a head of resilience, or a business continuity manager having the ear of the chief risk officer — the importance of resilience is now being resonated frequently in board meetings.

For financial services organizations, incoming operational resilience regulations mean resilience must have the attention of those in the most senior ranks, and members within the sector generally agree that regulation is helping to push resilience into board meetings, risk committees, and technology committees.

However, while regulation might be helping to provide a more defined approach to resilience, it is once again the 'people' or 'soft' skills which are seen as vital in resilience roles. Having 'a high level of experience', 'being able to see the bigger picture', and being a 'communicator' are the top three attributes that respondents believe are crucial to being an effective business continuity or resilience manager, whereas 'goal orientated', 'process orientated', and 'granted authority' languish towards the bottom of the table. Furthermore, the gap between the importance of a 'high level of academic qualification' (17.6%) and a 'high level of professional qualification' (45.8%) has grown further this year demonstrating the desire for organizations to have trained professionals — with practical experience — in resilience roles.

Overall, the industry has gone through an exciting shift over recent years and it is refreshing to see that these new processes and procedures are maturing, with organizations now embedding these into business-as-usual practices. Senior management and c-suite appreciation of the importance of resilience is finally on the rise.

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 Riskconnect for their sponsorship of this important report.



Rachael Elliott

Knowledge Strategist
The BCI



Foreword

Riskconnect is proud to once again sponsor the Business Continuity Institute's Continuity and Resilience Report 2024.

Thanks to current world events, continuity and resilience remains at the forefront of leadership teams minds. This year's report highlights several key drivers for this continued focus, but it is clear to any risk/resilience practitioner from taking a quick look around, that growing demands on their programs and the current threat landscape continues to warrant increased focus and investment in nearly every organization's resilience initiatives.

This year's report highlights the ongoing shift towards continuity and resilience programs taking a more strategic view, as opposed to being more operationally focused, which is an imperative to be able to adjust to the threats organizations are facing today. The more strategic view lends itself to taking a more proactive approach, as opposed to what could be viewed as a more reactive operational approach historically. While Operational Resilience regulations are certainly a driver of this shift, it is our experience that organizations are also simply realizing that they can no longer afford to remain reactive, the stakes are just too high. Aligned with the more strategic view many organizations are taking, the report also highlights the fact that continuity and resilience programs are seeing "shorter and more defined reporting lines to the c-suite".

Another very insightful portion of this year's report is the summarization of practitioner's thoughts on the top five most important attributes for continuity and resilience managers in 2024. It is encouraging to see the top three being 1) high level of experience (64.8%), 2) being able to see the bigger picture (61.6%), and 3) a communicator (57.4%). All three of these are imperatives for being able to effectively collaborate across the organization on more strategic initiatives.

One final encouraging takeaway from this report was to see that nearly two-thirds of all respondents said that they were seeing additional support (financial and otherwise) for their programs, with only a very small contingent of respondents expecting flat or decreasing investment. Noting the expanding expectations on these programs, coupled with the threat landscape looking as it does, this is an extremely positive trend for practitioners tasked with continuity and resilience for their organizations.

I hope that you enjoy reading this report as much as I did and find the insights to be equally valuable as you think about your own organization's continuity and resilience efforts in 2024 and beyond.



John Verdi
Senior Director Professional Services
Riskconnect

Executive summary





With business continuity (BC) and resilience becoming better defined in organizations, is BC making a return to its traditional roots?

When respondents were asked to place where BC was in their own organization on a scale of 1 (purely operational) to 100 (purely strategic), the average mark given this year is 52.9 — down on last year’s figure of 54.3. While resilience professionals are reporting that roles are having closer reporting lines to senior management, and are now involved in making strategic decisions regarding future resilience plans, some are noting that BC has been segregated from ‘resilience’, and BC has gone ‘back to basics’. Indeed, the top three outcomes of BC according to respondents are minimising internal impact when faced with a disruption (89.3%), creating plans to respond to and recover from disruptions (88.9%), and exercising and testing response and recovery strategies (84.4%).



BC and resilience are increasingly having their own, separately defined, space in organizations

The top six outcomes of BC in organizations according to respondents

1



89.3%

Minimising internal impact when faced with a disruption

2



88.9%

Creating plans to respond to and recover from disruptions

3



84.4%

Exercising and testing response and recovery strategies

4



81.1%

Continuing improving response and recovery strategies

5



76.5%

Creating a team (or teams) to respond to disruption

6



69.1%

Establishing downtime and data loss tolerances

As defined 'resilience' roles increase, dedicated BC roles are becoming more operational

Average score of respondents when asked to place how strategic the BC manager role was in their organization (0 = Purely operational; 100 = Purely strategic)

58.8%



2021

53.8%



2022

53.4%



2023

52.0%



2024

Resilience is now getting more airtime in board meetings, with closer reporting lines to the board helping to increase this engagement

Four in ten respondents report having a dedicated person now in place who acts as the middle-person between the board and resilience-orientated middle management to promote the importance of resilience to the top echelons of management. This person is typically a “Head of Resilience”, or a “Chief Resilience Officer”, but it could equally be someone such as a business continuity manager who has the direct ear of the Chief Risk Officer. However, actually having someone on the board to champion resilience is something which is highly desirable by the practitioner community – but difficult to achieve. Less than a quarter of resilience professionals actually have someone at board level in this role, and a further 42.1% say they would like the role to be there, but there is no support for it. Less than 10% admit that they did not perceive a need in their own organization. Nevertheless, even if the role does not exist, interviewees frequently report that there are now fewer levels between themselves and top management.

A resilience ‘middle-person’ between the board and the rest of the organization is increasingly helping resilience be heard at the top level

Do you have a dedicated person responsible for overseeing the running of a resilience programme who reports directly to the board?

 **40.2%**
Yes


 **46.4%**
No


 **6.7%**
Unsure

The existence of an individual at board level is less common – but it remains something that is hugely desired by the practitioner community.

What is your opinion of establishing a board level appointment with responsibility for promoting resilience and ensuring a company-wide approach to resilience?

 **24.5%**
We already have such a person in our organization

 **42.1%**
I would like this role to be created, but it will be difficult to get support for it in my organization

 **9.9%**
There is no need for this within my organization

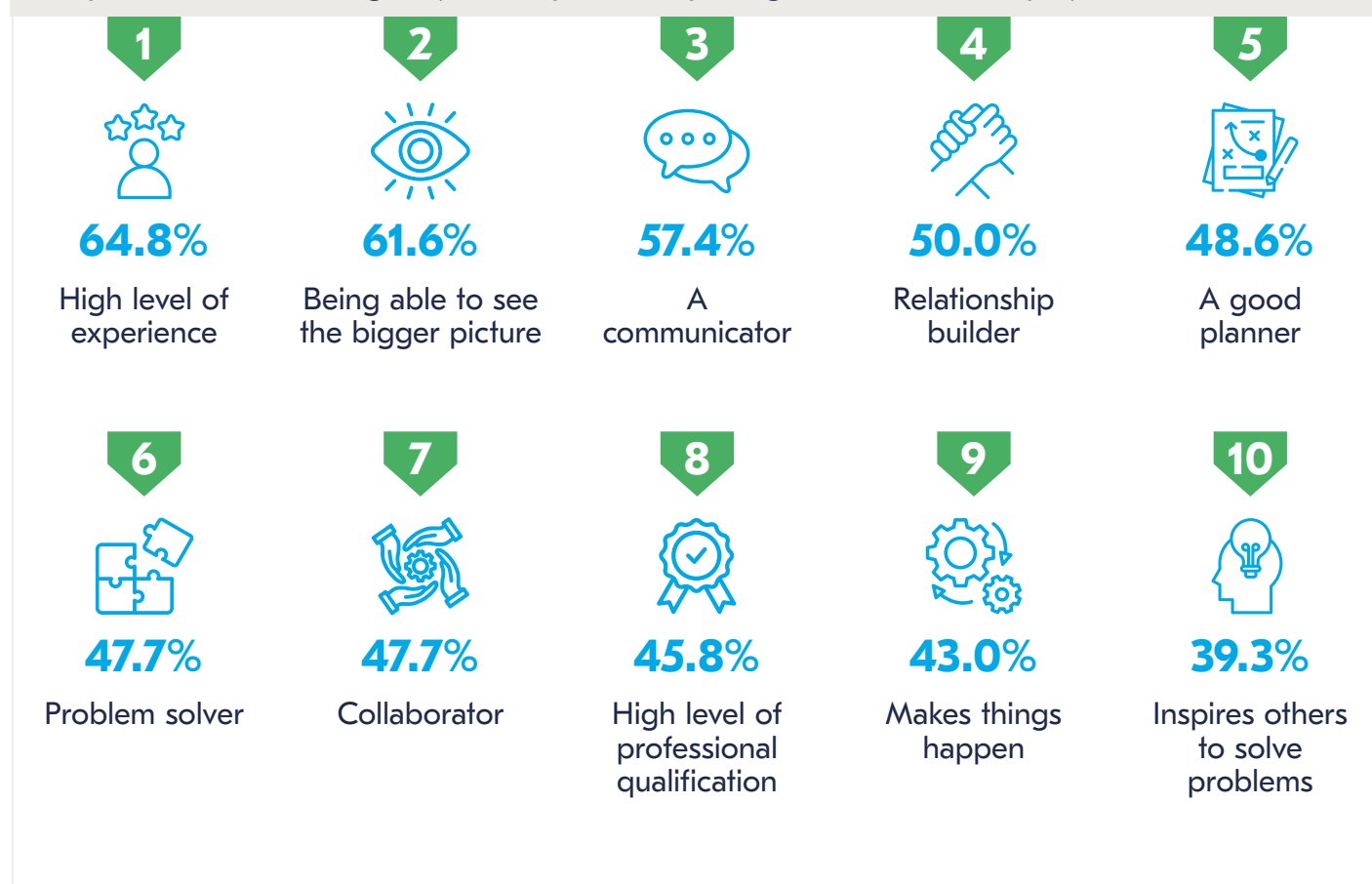
 **8.6%**
My organization is too small to warrant the creation of this role

Collaboration, experience, relationship building – the new attributes of today's BC manager

This year's report notes a striking change in the key attributes required of a BC manager. Last year, people skills were making their way up the list of attributes that respondents felt were crucial for a BC manager— but this year the shift has been more marked. A 'high level of experience' tops the table, moving up from only mid-table last year, while 'being able to see the bigger picture' has moved to second place this year from near the bottom of last year's table. Meanwhile, having a practical, professional qualification (45.8% of respondents) is seen as being 2.5 times more important than an academic qualification (17.6%). Other aspects such as 'controlling' has dropped from second-place to midtable, while last year's top result of 'process orientated' has gone down to 11th place. Although following process is obviously a critical requirement for BC professionals, the decline in position in the table is likely to be due to recognition that practitioners now have to be flexible and agile in their planning – and sometimes stray from rigid process.

People skills dominate the top of the table, while traditional 'command and control' sinks to the bottom

The **top** ten answers when respondents were asked which top five attributes are important for BC managers (% of respondents putting answer in their top 5)



People skills dominate the top of the table, while traditional ‘command and control’ sinks to the bottom

The **bottom** ten answers when respondents were asked which top five attributes are important for BC managers (% of respondents putting answer in their top 5)



As workers increasingly move to remote and hybrid environments, many BC plans still revolve around physical premises

Workplaces are increasingly becoming hybrid or entirely remote environments, with just 5.7% of respondents saying that remote working is not possible within their organization. With workers carrying out critical activities from home or other remote sites, organizations should ensure these workers are backed up by the same resilience measures that are in place in offices. Although 12.4% do have plans to get measures in place, a seventh of respondents (14.3%) have no plans to ensure the resilience of remote workers at all. Health and safety has better consideration, but only 41.4% of respondents say that health and safety measures for remote workers are 'exactly' the same as they are in the office.

One in seven organizations have no resilience cover for those working remotely

The percentage of respondents having/not having resilience plans for remote workers



22.9%

Resilience for remote workers was in place before the COVID-19 pandemic



39.5%

Resilience for remote workers was introduced during the COVID-19 pandemic



12.4%

Actively planning/considering resilience measures for remote workers



14.3%

No plans to introduce resilience measures for remote workers

Better plans are in place for health and safety for remote workers – but still big gaps

The percentage of respondents having/not having health and safety (H&S) plans for remote workers



41.4%

Remote workers have exactly the same H&S measures as on premises workers



30.5%

Some measures are in place, but improvement needed



4.3%

Actively planning/considering H&S measures for remote workers



10.9%

No plans to introduce H&S measures for remote workers

Technology – can resilience live without it?

Technology is now so intrinsically linked with resilience, it would be difficult to find any organization that doesn't use it in some way. However, technology has now got to the stage where it can speed up processes, help practitioners perform deeper levels of analysis, and collaborate effectively through remote channels. Others are going one stage further and already using AI technology to create scenarios, to mine large pools of data, and even assist with traditional BC processes such as the BIA. Still, relative to other technologies such as emergency notification software and BC planning software, usage is low – but rising fast.

Traditional technologies still dominate, but AI is now used in 1 in 14 resilience settings

Technologies used in resilience in respondent organizations (selected answers)



42.8%

Emergency notification software



38.1%

Team collaboration tool



30.4%

Software-as-a-service BC planning tool



15.5%

Risk mapping software



9.8%

Environmental monitoring tool



7.2%

AI tool

Support for resilience is growing. Do senior management and the c-suite finally ‘get it’?

With rising inflation, increasing cost pressures, and tested supply chains, organizations globally are tightening their belts. Traditionally, resilience measures would often be the first casualty of cost cutting: seen as a sink on the balance sheet, executive committees would rather spend their cash on revenue-generating activities. However, with the world being plunged into deep, often concurrent, crises, management teams are increasingly seeing the value — and competitive advantage — of investing in resilience. Incoming operational resilience regulation is also helping to drive investment as organizations risk serious fines if they do not adhere to the requirements.

Nearly three-quarters of respondents are seeing increased financial and/or resource support for BC in their organizations

Is your BC and/or resilience department now receiving additional financial and/or resource support?



Practitioners will look to increase support from senior management even more in the future, along with other forward-thinking themes for the sector

Although it has already been ascertained that senior management attention to BC and resilience is set to rise, 86.9% of practitioners believe this attention will rise even further over the next five years. Interestingly, the importance of post-incident reviews (PIRs)/after-action reviews (AARs) also sits near the top of the table in terms of medium-term priorities. This has undoubtedly been spurred by COVID-19 where these reviews uncovered, often very public, failures of resilience in organizations. Meanwhile, operational resilience has leapfrogged organizational resilience in terms of importance (almost certainly driven by regulation), while ‘people-focused’ planning will take priority over ‘premises-focused’ planning. But what about the business impact analysis (BIA)? It is in a relatively lowly position in the table, with a relatively large proportion of respondents (8.5%) saying it will have less importance. However, interviews confirm this is more around the process of the BIA (rather than the BIA itself), and practitioners are already looking to use technology to help with the quality, agility, and efficiency of the process.

Premises-focused, incident-specific plans, and organizational resilience are making way for people-focused, agile/adaptive plans, and operational resilience

How will the importance change of various aspects of BC and resilience over the next five years? (Selected answers)

Answers gaining the most ‘more importance’ responses



Answers gaining the most “less importance” responses



Business Continuity and Resilience



Business Continuity and Resilience

- **A year of heightened political activity due to the number of elections, continuing global conflicts, worsening extreme weather events, and global software outages, has seen resilience propelled to the fore in many organizations.**
- **The renewed focus is seeing some organizations set up a distinction between 'traditional' BC and resilience.**
- **Four out of ten organizations now differentiate between BC and resilience, with Africa and Asia the most likely regions to make the differentiation.**

2024 has been another year where resilience professionals have been challenged by known — and unknown — disruptions to their organizations. One of the defining moments of the year was the CrowdStrike outage in July 2024 which has been unproudly hailed as 'the biggest outage ever', while the 'super election' year has put political risk and violence at the highest position in the Allianz Risk Barometer since 2017¹. Operational resilience deadlines are approaching in 2025 for Australasia, the European Union, and the United Kingdom, while extreme weather events caused by climate change attributed to \$41bn of damage in just the first six months of the year.

Such a varied risk landscape is not new, but the globalisation of crises (as demonstrated by events such as CrowdStrike, the COVID-19 pandemic and interlinked political disruption) means that many organizations are faced with resilience challenges that they have not witnessed throughout their corporate history.

What is clear, however, is that many business continuity (BC) professionals continue to see the scope of their roles widened. Merely ensuring an organization can keep operationally active in the event of a disruption is no longer enough: organizations are putting resilience to the fore and investing in tools and staff to ensure their organization can not only proactively prevent incidents occurring, but also considering the effect of disruption on the external market.

Cross-departmental, non-siloed working is also now essential to ensure organizations can effectively manage disruptions: for example, security teams working with business continuity during periods of civil unrest, business continuity collaborating with IT to ensure technology operations can continue in the event of a cyber-attack, or external communications working with the crisis team during a major incident. Furthermore, blaming a third-party supplier is no longer an acceptable excuse for an outage given the rigorous checks and supplier management programmes organizations should be implementing for critical suppliers (as in the case of the McDonald's systems outage in March²), and with misinformation now having the potential for significant reputational and financial harm, organizations are now having to take extra steps to ensure they are protected from this contemporary risk³.

As a result of this, BC professionals are now seeing their roles changed dramatically, with many having this reflected with new 'resilience'-orientated job titles, and altered job descriptions. For many, this means stepping up the use of technology to ensure they are able to meet the extended demands of their roles. This report will seek to determine how these new challenges — and opportunities — are shaping the resilience profession.

Proportionately, the number of organizations differentiating between BC and resilience is lower than those that do not, but this is changing: now, nearly a quarter of organizations (24.3%) have separate BC and resilience functions, an increase of 3.2 percentage points in the last 12 months. Meanwhile, the proportion of organizations not defining a difference between the two has declined by nearly six percentage points since the last edition of this report.

Interestingly, Africa and Asia stand out as the regions with the greatest number of organizations defining a difference. More than three-quarters (76.7%) of organizations in Africa and 65.0% in Asia differentiate between the two. Indeed, members in countries towards the south of the African continent such as South Africa, Zimbabwe, Botswana and Kenya, speak of highly embedded resilience programmes which dovetail together. Meanwhile, North America has the fewest organizations making such distinctions, with only 34.3% differentiating between BC and resilience in their functional areas. This may well change in 2025 as the development of operational resilience regulation is expected to begin⁴.

"Around 2010-2014, business continuity was more of a tick box exercise for many businesses and industries. However, in the past 10 years we have seen a significant switch in prioritised focus that led to operational resilience and, in cases, to organizational resilience and still continue to evolve from there."

Head of resilience, financial services,
South Africa

"For me, business continuity is one of the tools that makes organizations resilient."

Head of business resilience, retail, UK

"Business continuity is how we operate the incident response, or recovery response, whereas operational resilience is more about identifying risks and managing them."

Head of resilience, financial services,
South Africa



Figure 1. Does your organization differentiate business continuity and resilience?

However, when respondents were asked to differentiate between BC and resilience, answers varied. Some organizations are proactively reorganising their organizations to have both ‘resilience’ and BC departments, demonstrating an appreciation of the importance of having a function which can work to ensure the different elements of the resilience jigsaw work in harmony together. One out of four organizations (24.3%) that differentiate between the two terms now have separate BC and resilience departments within their working structures. Meanwhile, the majority of organizations choose to differentiate between the two roles but they still fall into a single department: interestingly, while two out of five (39.8%) only have a BC department, more than a fifth (21.3%) have a ‘resilience’ department. This is a fairly high proportion of respondents given the relative infancy of ‘resilience’ compared to BC.

“We changed the name of a group from the ‘business continuity, emergency planning, crisis management and resilience group’ to ‘business resilience’ to incorporate all of those different strands.”
Consultant, security sector, UK

“We’re using the term resilience to shift a mindset in the culture of the organisation. I have recently adopted it and we’ve changed the name of our team from disaster recovery to downtime resilience. We’ve changed the name to incorporate the resilience concept and to try to foster the idea of being able to quickly pivot and continue with minimal impact. The name disaster recovery was not encompassing everything that we were doing and had a negative tone preventing engagement.”
Downtime Resilience Team Lead, United States

A small subset of respondents (14.6%) report that the only differentiation is a plastic job title change from BC to resilience, with no actual differentiation between roles.

For some, they admit confusion within their own organizations about terminology, with senior leadership particularly having confusions over terminology.

"Business continuity and business resilience are different in my view. I think resilience is more strategic whereas business continuity is more operational. I design the programme's strategy and our tests and learning programme, our approach to business continuity processes such as BIAs. I ensure that the governance is right, and report to senior executives, but I also have responsibility to support crises when they happen and support local teams with the management of incidents."

Head of business resilience, retail, UK

"I think there is a lack of understanding between the concept of resilience and the concept of continuity. It's not well defined nor understood by leadership or operational teams... ..In our business continuity programme, we've introduced a focus on resilience as part of education and awareness. Having said this, trying to have leaders and employees understand that there's a difference between business continuity, personal resilience, and organisational resilience is half the battle."

Business Continuity Manager,
Human Services Sector, Australia

"We have a dedicated function that is responsible for overseeing the running of the resilience programme within our organization, which is regulated but also an internal requirement. We always consider regulations, that is part of our operational resilience journey."

Head of resilience, financial services, South Africa





Figure 2. How does your organization differentiate between business continuity and resilience?

Main outcomes of business continuity

When respondents were questioned about the primary outcomes of BC in their organizations, interestingly, despite the movement towards resilience, the two top responses centred around the more traditional aspects of BC. These were minimising internal impact when faced with disruption (89.3%), and creating plans to respond and recover from disruption (88.9%). Other top choices were exercising and testing response and recovery strategies (84.4%), continuing improvement of response and recovery strategies (81.1%), and creating a team/s to respond to disruption (76.5%).

The second half of the chart was focused on the wider, more strategic activities or a more holistic view of the function with factors pertaining to both operational and organizational resilience. The inclusion of ‘establishing downtime and data loss tolerances’ (69.1%) in sixth place and ‘planning for the disruption to IT assets and services’ (66.3%) in twelfth place gives a nod towards the increasing awareness of the importance of being resilient to IT/software disruption, while also being symptomatic of the increasing importance placed on this point by incoming operational resilience regulations such as DORA. ‘Preventing disruption’ (68.7%), ‘planning for the disruption of activities’ (67.5%), and ‘planning for the disruption to products and/or services’ (58.4%) shows that around two-thirds of respondents are now taking a more proactive view of resilience. However, with just 58.6% looking to address potential customer harm during disruptions, and only 53.9% saying they coordinate with other risk disciplines actively and regularly, these key elements of resilience are still either missing from plans, or are reserved for another department in the organization.

“I think that you can’t have good business continuity if you don’t consider your customer impact amongst the range of impacts you plan for.”

Head of business resilience, retail, UK

Which of the following are outcomes of business continuity in your organization?

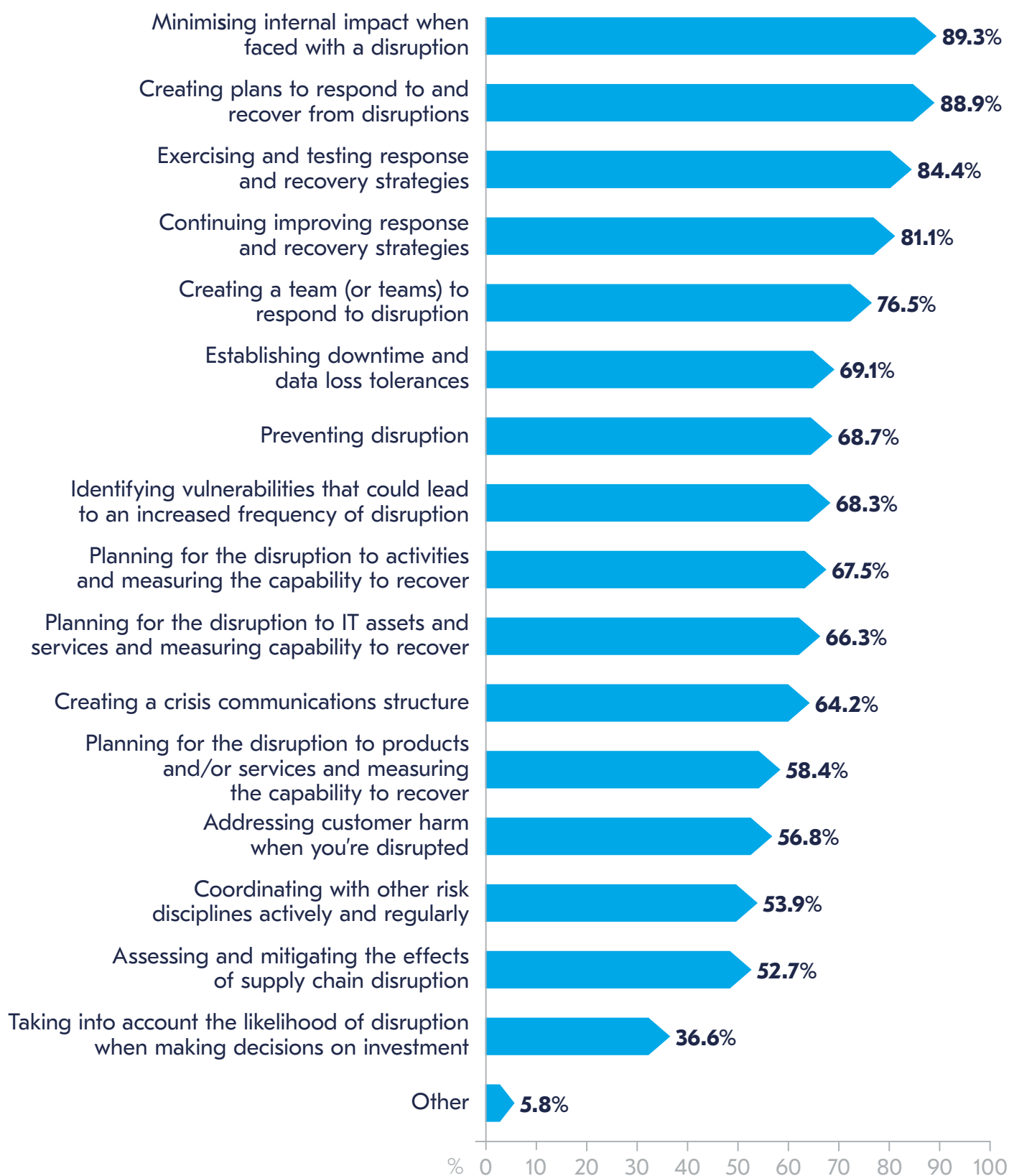


Figure 3. Which of the following are outcomes of business continuity in your organization?

**BC: more
strategic or more
operational?**



BC: more strategic or more operational?

- **The balance of those practitioners who view their role as more strategic than operational has dropped slightly this year, with an average score of 52 (based on a scale of 0 to 100 where 0=purely operational and 100=purely strategic)**
- **This is not a surprise result given that the primary outcomes are still focused, first and foremost, on the operational side of response.**
- **Respondents from Asia are most likely to consider BC as more strategic than operational (balance of 61.0), whereas those from North America are more likely to perceive BC as more operational (balance of 46.1).**

Despite the fact that more than 50% of organizations do not distinguish between BC and resilience, the previous graphs show how the BC role is increasingly incorporating more strategic elements of resilience, moving beyond a purely operational focus. This shift has led to greater recognition of the value of BC/resilience managers by senior management, expanding their role into the strategic domain.

In light of this, respondents were asked to place on a scale of 1 (purely operational) and 100 (purely strategic) where they felt their role was best defined. The results of this have remained fairly static for the last three years, with BC managers seen as marginally more strategic than operational, with an average score of 52 — just 1.4 points lower than twelve months ago. This is to be expected — while there are more resilience-orientated roles in organizations, the primary outcomes, as described above, are still first and foremost focused on the operational side of an organization.

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

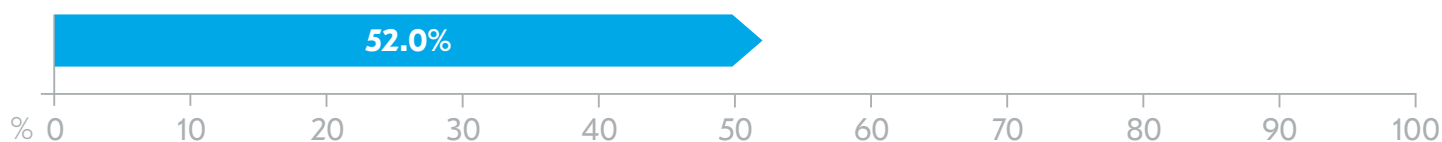


Figure 4. On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of business continuity manager/head of business continuity now lies within your organization?

Respondents then carried out the same exercise and rated the positioning of their resilience manager/head of resilience on a scale from 1 (purely operational) to 100 (purely strategic). More interestingly, the average score here was 52.9 – less than one point differentiating the two roles. This is down from 55.2% in 2023. This closeness of the figure in both questions demonstrates that the distinction between roles is becoming more blurred by the year, and shows the normalisation of resilience-orientated activities in BC roles. Indeed, many organizations have yet to clearly define the differences between BC and resilience roles, often using the terms interchangeably to cover the same elements, and this suggests that the need for a defined difference has declined year-on-year given the blurring of responsibilities. However, it is important to look outside our immediate sector to explore how the profession is perceived from other parts of the business. An interviewee from the security sector described how he perceived the business continuity from his own perspective – and he believed it sat firmly within the ‘operational’ camp. Interestingly, another interviewee alluded to this view as well: with a new ‘head of organizational resilience’ role being created, they felt the strategic elements would fall to this person, while the more operational duties would fall back to business continuity.

“From a security practitioner’s view, business continuity and resilience are both operational, but business continuity is more operational.”

Consultant, security sector, UK

“The most important attributes for a business continuity or resilience manager are the same and they’re predominantly soft skills. I think with the new head of resilience role in my organisation, the strategic bits may move away and we’ll be more involved in the day-to-day operational side of business continuity.”

Head of Emergency Planning and Resilience, public sector, UK

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?**

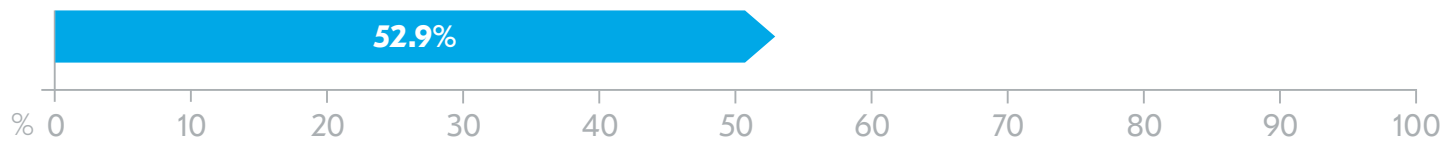


Figure 5. On a sliding scale of 1-100 where 1 is purely operational and 100 is purely strategic, please rate where the role of the resilience manager/head of resilience now lies within your organization?

However, differences occur when considering different regions. In both Africa and Asia, it is the BC manager who is considered as having a more strategic outlook than a resilience manager. This is perhaps due to different definitions in both regions, and the fact that BC already has a strategic place in organizations. In Africa, for example, interviews both for this report and events that researchers at the BCI have attended, have showcased the remarkably diverse capabilities of BC professionals. Meanwhile, in Asia, there are some geographies (such as Japan) where a 'resilience manager' is something which has barely been heard about in most organizations, and the concept of BC is still defining itself as something extant from disaster management. Interestingly, in North America, both roles are still considered to be more operational than strategic; something which may change over the course of the next 12 months as new operational resilience regulations are likely to be considered.

"I see the business continuity manager between the technical layer and the operational layer, whereas the resilience manager is between the technical and strategic layer."

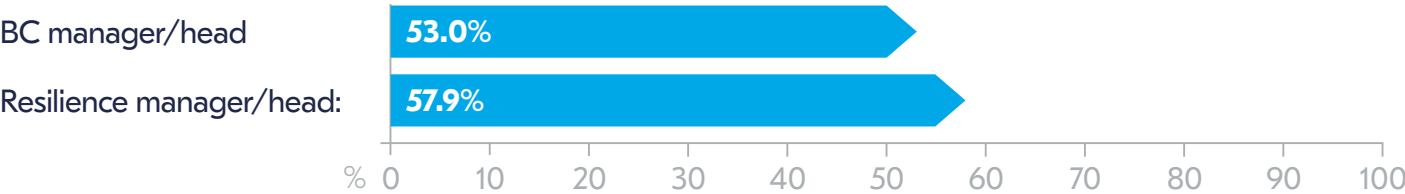
ICT manager, public sector, Australia

"In my role, strategic inputs are required for business continuity and resilience because we write plans and frameworks which are implemented by individual services to suit their function. Our organization is public sector and vast so the resilience team can't be an expert in everything. We provide advice, support, guidance, training, exercising, and tools to departments."

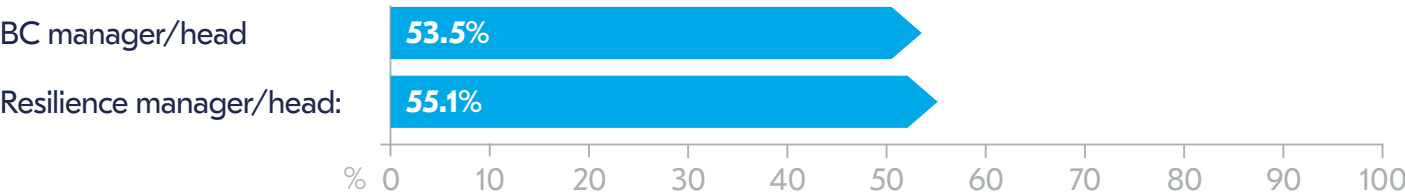
Head of Emergency Planning and Resilience, public sector, UK

BC and resilience managers' roles: average scores on balance where 0 = entirely operational and 100 = entirely strategic

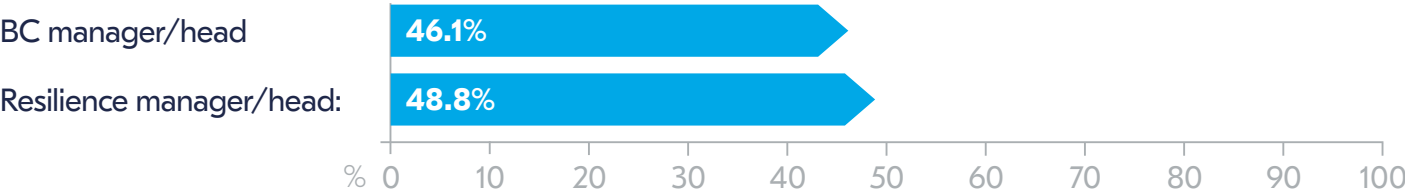
Europe



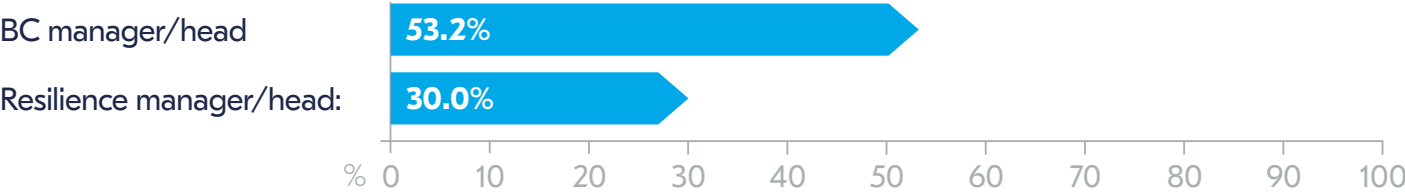
Australasia



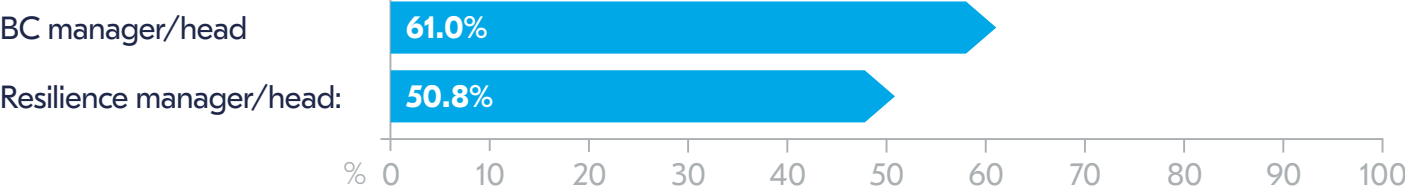
North America



Africa



Asia



“We consider business continuity as being our guideline to operational response as where operational resilience is more strategic in the layout of our key focus areas. For us, business continuity is there to make sure there’s the right response to a disaster or disruption, it’s where our recovery strategies come in. Operational resilience focuses on Important Business Services, critical timelines, and impact tolerance.”

Head of resilience, financial services, South Africa

Evolution of BC & resilience roles





Evolution of BC & resilience roles

- **Despite the change the industry is seeing, just under two-thirds of respondents do not think their job title will change from 'business continuity' to 'resilience' at the moment.**
- **Of those who have had their job title changed, the majority (63.8%) have had it done so to reflect the more strategic nature of their role.**

The previous section shows how the lines between BC and resilience are becoming ever more blurred as the remit of BC professionals continues to broaden with roles becoming more outward looking, more proactive, and becoming more involved in the strategic elements of organisations' resilience.

Data analysed if respondents had seen their job title changed to include resilience recently, with 38.3% of respondents reporting that it had, or will do in the near future; a negligible difference from the 2023 figure of 41.9%. Additionally, since the question pertains to "recent" job title changes; most practitioners whose roles evolved due to the post-COVID period would have already been accounted for in previous reports.

The regions where most job titles have already changed to resilience are: Asia (35.0%), Africa (25.0%) and North America (25.0%). In Europe, however, just 19.1% (2023: 15.9%) report job title changes to incorporate resilience. Interestingly, financial authorities in Europe have been frontrunners at launching new operational resilience regulation in financial services. Interviewees in the region, both this year and last year, have spoken about how this means the role of the BC professional has become more defined and, in many cases, has retained its primarily operational facet to work closely with operational resilience professionals.

"Lots of people have job creep where the role of the business continuity manager is expanding into that of an operational resilience manager's role but without the name attached. Although this works in the organizations and their favour if they do eventually mature into operation resilience, it doesn't give the recognition to the practitioners themselves which can be a problem."

Global business continuity manager,
professional services, UK

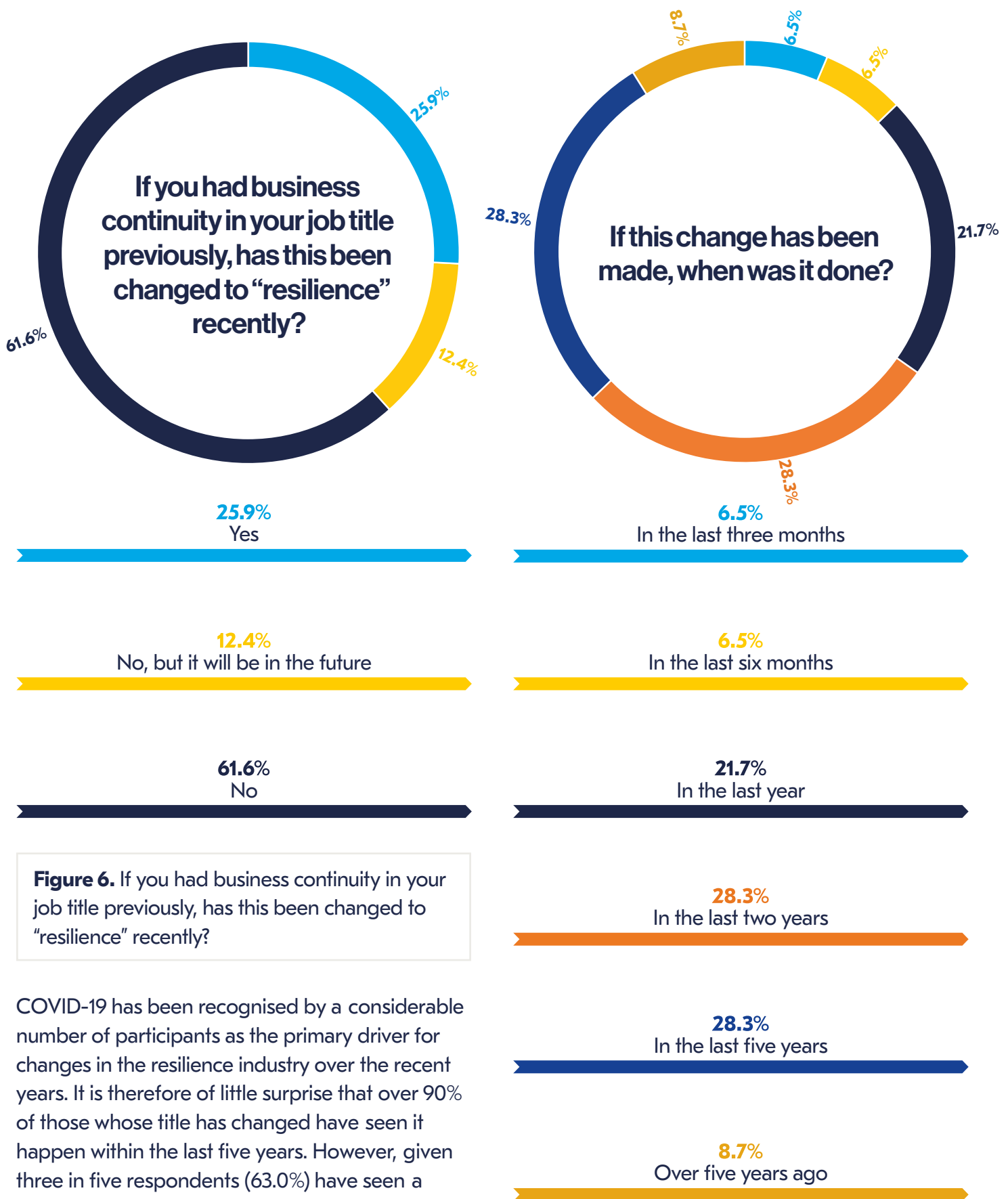


Figure 6. If you had business continuity in your job title previously, has this been changed to “resilience” recently?

COVID-19 has been recognised by a considerable number of participants as the primary driver for changes in the resilience industry over the recent years. It is therefore of little surprise that over 90% of those whose title has changed have seen it happen within the last five years. However, given three in five respondents (63.0%) have seen a change in their job titles within the last two years, suggests that new factors are at play, such as the adoption of operational resilience regulation and governmental rules and guidelines coming into play, particularly for public sector organizations.

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

Respondents were then questioned about the reason for the role title change. 63.8% (2023:70.2%) said the change was made to better reflect the wider, strategic, remit of the BC role. This answer remains the top choice for respondents.

Other reasons selected were to promote better working practices within their organizations (36.2%), and because organizations have rewritten their BC processes and procedures to better reflect the modern working environment and resilience provides a closer definition of this new role (31.9%)

Another reason provided by almost a third of respondents (31.9%), and falling from second place in 2023 to joint third-place now, is the need to make the role better understood by the whole organization. 'Resilience' is a term that the business and, crucially, it is a term that resonates closely with management.

What was the reason for the role title change?

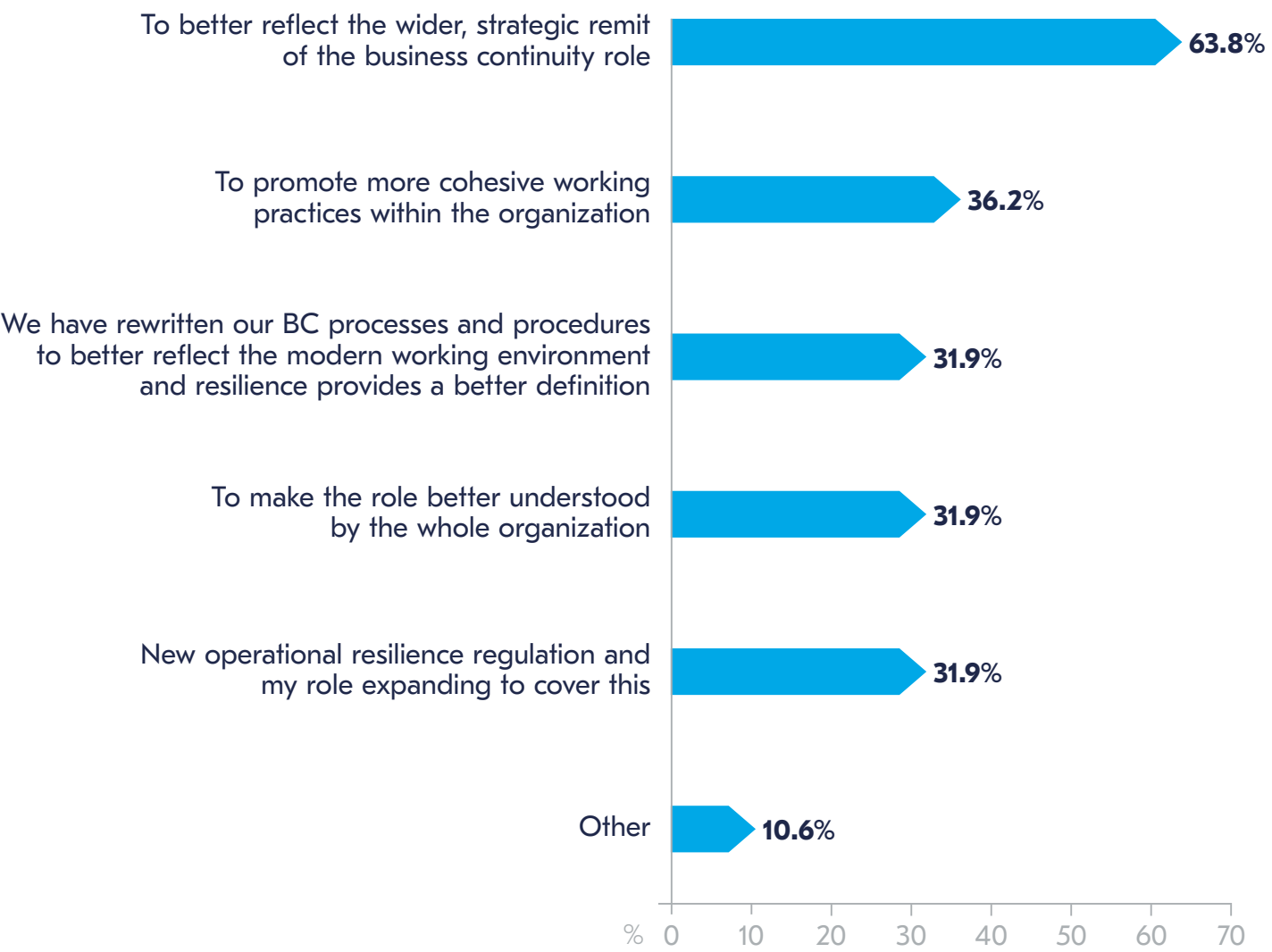


Figure 8. What was the reason for the role title change?

4 Implementation of resilience programmes



Implementation of resilience programmes

- **BC is most likely to carry the responsibility for implementing resilience programmes across organizations (27.5%), while organizational and operational resilience have the responsibility in 14.2% and 10.3% of organizations respectively.**
- **Two in five organizations now have a dedicated person in the organization to oversee the running of resilience programmes who reports directly to senior management/the board.**
- **A further quarter (24.5%) have someone directly at board level who champions resilience throughout the organization, although the largest bulk of responses (42.1%) say that they would like to have such a role in place – but cannot get the senior buy-in required.**

The part of the organizations responsible for resilience programmes presents a mixed view. Perhaps to be expected with the similarity between both roles, over a quarter (27.5%) say that BC carries the responsibility in their organization, marginally up from 27.1% in 2023. Meanwhile, a growing number of organizations now have/also have standalone organizational (14.2%) and operational (10.3%) resilience; the latter noting a 3.2 percentage point increase, undoubtedly due to incoming operational resilience regulations. Risk management (12.5%) sees a near 4-percentage point drop from 2023 with other departments (such as IT) playing the lead role in a small percentage of organizations. These replicates the same results as 2023. All these functions play a crucial role in identifying and assessing potential risks and vulnerabilities, developing strategies to mitigate them, and ensuring the organization can quickly recover from disruptions. On examining the high percentage of respondents who answered 'other', the majority said that responsibility lay across multiple teams or, in some cases, there was no management of it at all.

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

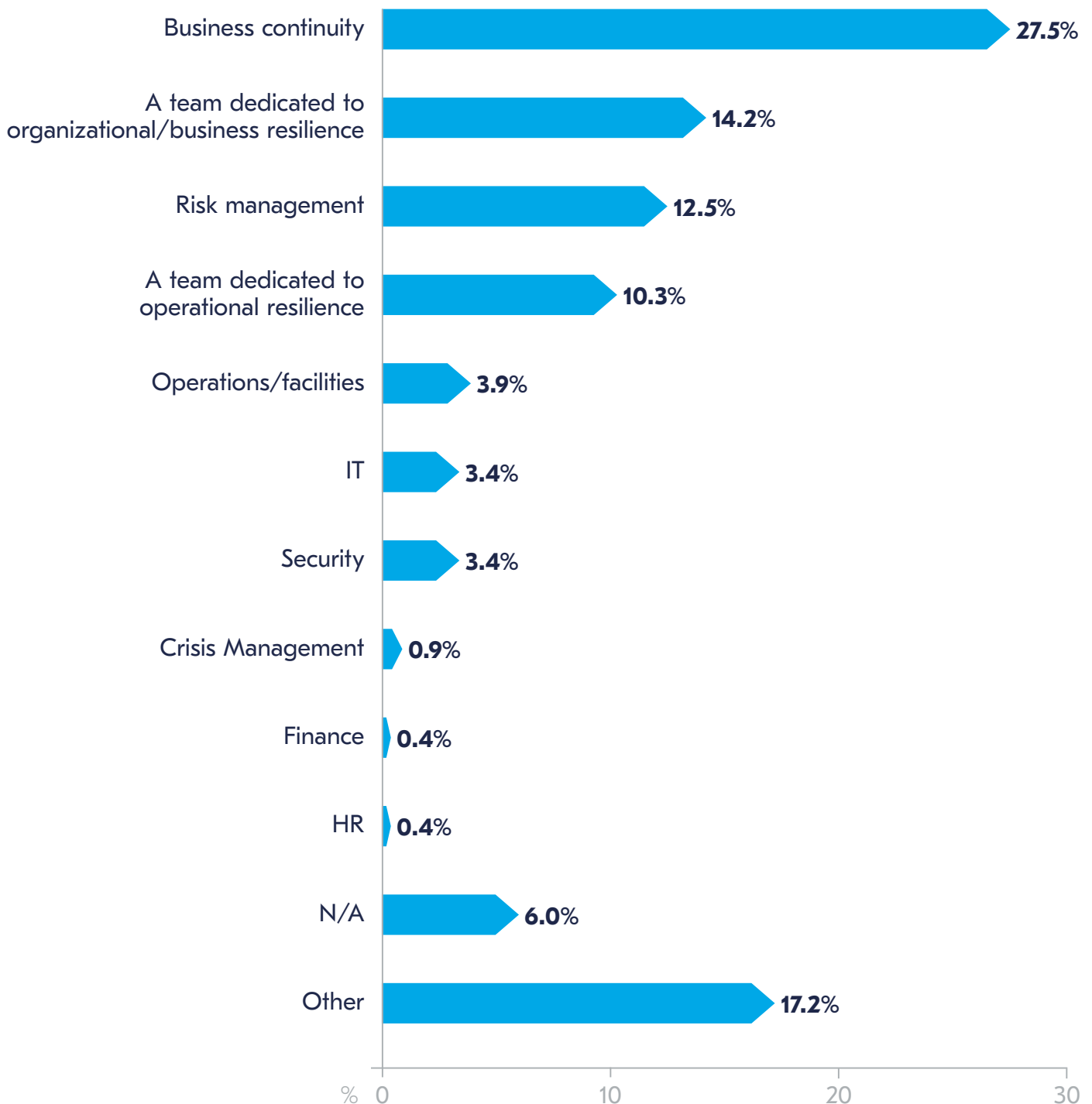


Figure 9. Which part of your organization is responsible for the implementation of resilience programmes?

Last year’s report⁵ highlighted the crucial role of the relationship between the senior leadership of resilience programmes and the team implementing and managing an organization’s resilience programme. The more successful the relationship between those implementing and those leading ultimately leads to more effective programmes. To nurture this, many organizations ensure that there is someone in the organization (increasingly a ‘Head of Resilience’) who has a direct reporting line to the board, but who also ensures the implementation is being carried out effectively. An interviewee spoke how they had recently appointed a head of organizational resilience which was going to be instrumental in getting the support at senior level. The creation of such a role was only after years of persistence, showing how persistence can pay off.

“Currently a member of my team is responsible for overseeing the running of our business continuity programme. Getting strategic buy-in is difficult due to the culture, we’ve always been trying to get things done from the bottom up rather than having it from the top down, but a new head of organizational resilience role has been created to address that... I’ve been working towards changing the culture at the top of the organization, to get them to understand that they need to invest in resilience, for the past three to four years.”

Head of Emergency Planning and Resilience, public sector, UK

In order to better understand this relationship, respondents were queried whether they have such a person within the organization. 40.2% of respondents say they do have such a person, a slight decrease of 3.4 percentage points on the last edition of this report, but qualitative comments showed that the effectiveness of this role was increasing.

For most (61.3%), the role was implemented in the last five years, with a third of that number (30.0%) seeing implementation in the last two years. This finding again ties with the increased appreciation of resilience as a result of the COVID-19 pandemic, as well as new laws, regulations, and guidelines emerging in the past two years relating to both operational and organizational resilience.

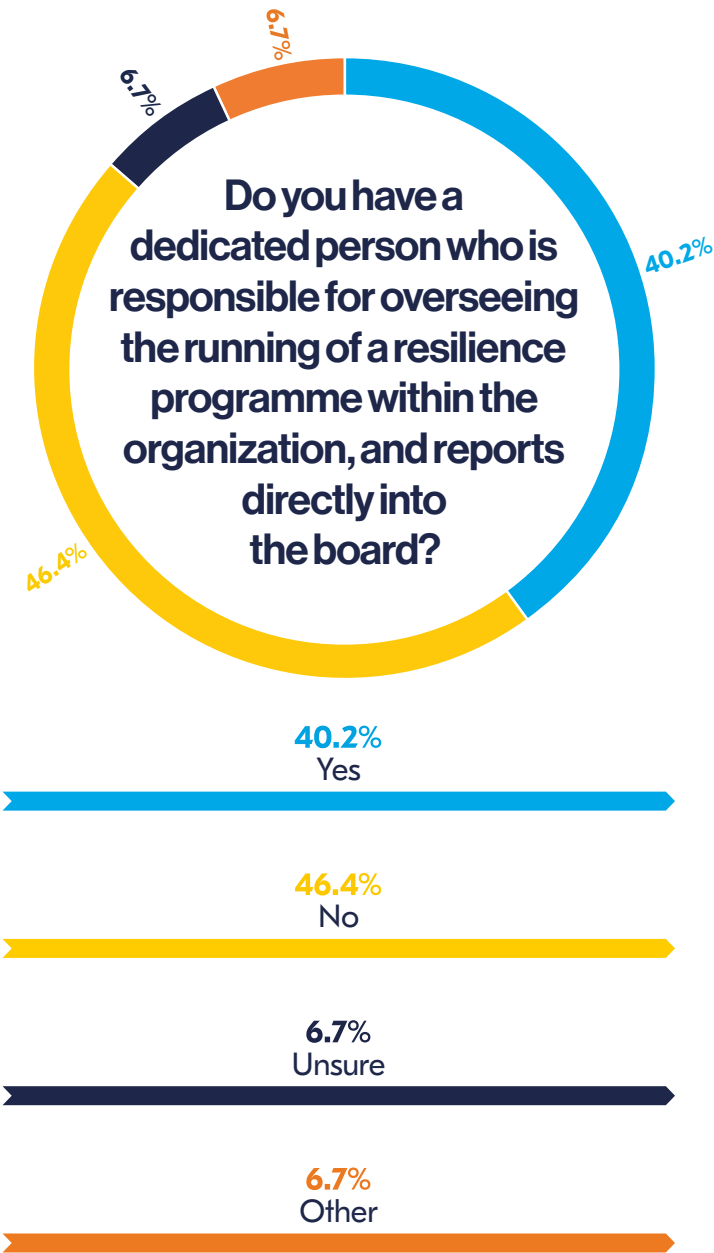


Figure 10. Do you have a dedicated person who is responsible for overseeing the running of a resilience programme within the organization, and reports directly into the board?



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

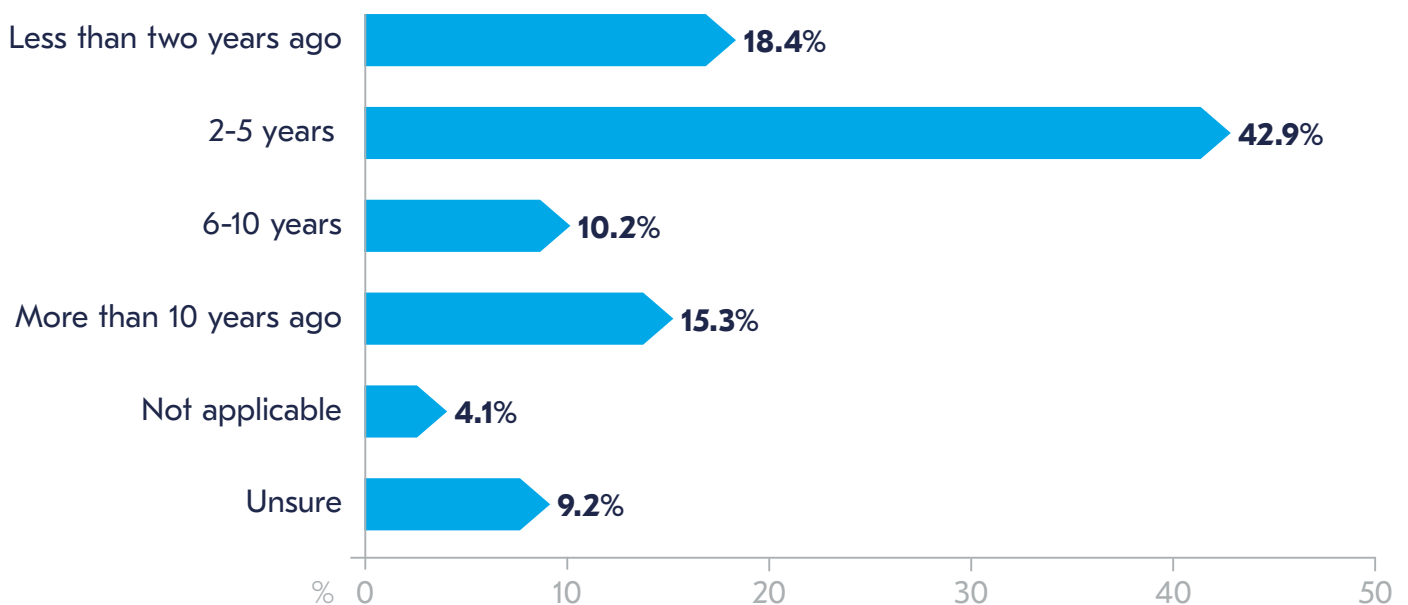


Figure 11. If you already have such a person within your organization, how long ago was this role created?

Regardless of whether a ‘Head of Resilience’ is in place in an organization, respondents are now noting shorter and more defined reporting lines to the c-suite, especially evident in financial services where new operational resilience regulations are in place — indeed, in such circumstances, it could be argued it is in the organization’s best interest to have a role in place in the organization to ensure it is able to meet its own regulatory targets. Nevertheless, there is still a clear desire amongst the practitioner community to have such dedicated person in place who has direct input at c-suite level. When this question was posed, 24.5% of organizations (2023: 32.1%) reported already having such a role with an additional 42.1% (2023: 37.0%) wanting such a role in place, but felt there was no support for it from senior management.



Figure 12. What is your opinion of establishing a board level appointment who will assess resilience at all levels and ensure all resilience building efforts within the organization are aligned and coordinated?

5 Ultimate ownership of resilience



Ultimate ownership of resilience

- **'The buck stops at the top' – the CEO is most likely to be the person who holds ultimate accountability for resilience in organizations.**
- **Sometimes operational resilience regulations dictate another board-level executive should be in charge: in the UK, this falls to the Chief Operations Officer (sometimes known as the SMF24).**

The championing of resilience programmes by top-level leadership plays an important role in ensuring all staff are aware of the part they play in the resilience of the organization. According to this year's data, nearly three-quarters (71.4%) of organizations report a board member as the person ultimately accountable for the organization's resilience programme. As per the last two years, the Chief Executive Officer (CEO) is the most likely board member to be in charge, with nearly a third (29.0%) saying the person at the very top holds ultimate accountability for resilience. This figure has, however, decreased over the last two years as Chief Operations Officers (COOs) (2024: 17.3%; 2023: 12.9%) are increasingly assuming this role, driven in part by new operational resilience regulations. Indeed, the UK's FCA/PRA/Bank of England operational resilience regulation implicitly states that it should be the COO (or SMF24) must be in the person with ultimate responsibility.

The role of the CRO is accountable for resilience in 11.7% of organizations (down slightly from 12.9% in 2023). Aligning risk management practices with resilience objectives is something that many organizations already do, although the BCI Operational Resilience Report 2024 showed that just a fifth of practitioners believe that operational risk and operational resilience is the same thing.

An interviewee commented that while the accountability was there, a wider approach with multiple board members was often employed. Indeed, for 6.5% of organizations (2023: 6.8%), the implementation of resilience is a shared responsibility.



“While we have strong risk leadership, including the Chief Risk Officer, most of these leaders are 1-3 tiers above my role. Their focus is predominantly on risk rather than resilience; reporting tends to be weighted on risk rather than resilience as well.”

Business Continuity Manager,
Human Services Sector, Australia

Some report responsibility elsewhere which can bring challenges, but for one interviewee, they spoke about how having the General Counsel accountable for resilience brought many advantages.

“In our organisation, the General Counsel is the executive member with accountability for business resilience, and our function reports into them. This gives us access to the top level of governance and the ability to table significant issues or concerns. It gives us the support of the board and the top executive in crisis management exercises, and it gives us sponsorship when we’re looking at complex projects like cyber resilience.

Head of business resilience, retail, UK

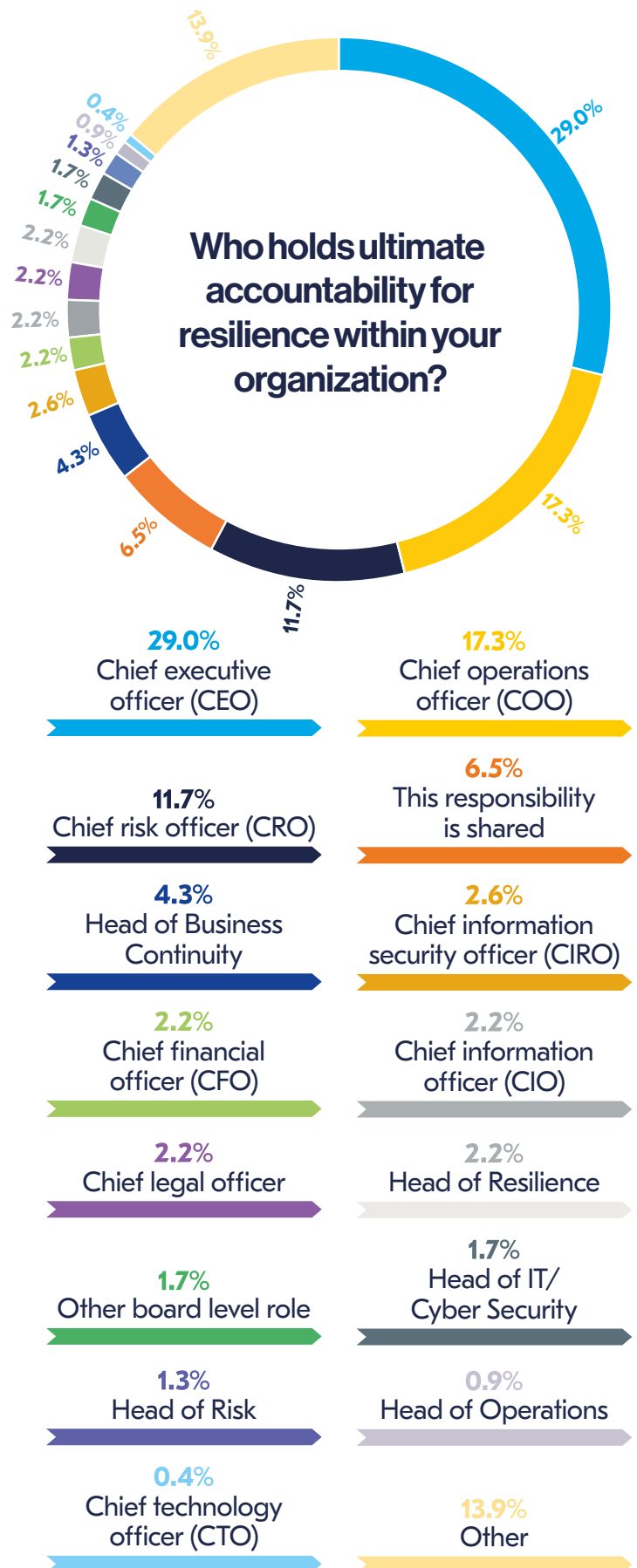


Figure 13. Who holds ultimate accountability for resilience within your organization?

The contemporary BC and resilience manager



The contemporary BC and resilience manager

- **People, or 'soft', skills are the most required attributes of a modern BC or resilience manager.**
- **Having a 'high level of experience' is this year's top attribute (64.8%), while being a good communicator is in third place (57.8%). 'Being able to see the bigger picture' has moved up to second place (61.6%) showing the importance of having an awareness of how BC fits into an organization's resilience jigsaw.**
- **A high level of professional qualification is considered an important attribute by nearly half of respondents (46.8%), whereas a high level of academic qualification is only considered important by 17.6%.**

To effectively implement a BC and/or resilience programme, it is natural to focus on the technical skills required.

However, research carried out for this report shows that having the correct people skills is, in many cases, even more important than the technical side — particularly as collaboration and communication are now an intrinsic part of successful programmes.

"Soft skills are needed for business continuity and resilience managers because when events happen the ability to communicate correctly and succinctly is important. Being a problem solver is core too, as are prioritisation skills."

Consultant, security sector, UK


As this report has already shown, business continuity is traditionally more reactive than proactive (although an interviewee explained how this was still a problem in their own organization). However, we are now seeing professionals becoming involved in strategic decision-making processes, and at the core of organizational resilience programmes. Previously, BC managers focused on creating reliable plans and conducting business impact analyses (BIAs), often with minimal engagement from senior executives and the c-suite – even though this is something which the BCI's Good Practice Guidelines (GPG) advocates for⁶. However, as discussed earlier in this report, increased interest in resilience from senior management requires professionals to have a more strategic, outward looking focus. Therefore, the attributes of BC managers are now being extended to building relationships with various departments to foster a resilient culture throughout the organization. As such, respondents were queried into the most important attributes they think are crucial for a BC and resilience manager nowadays.

"We're trying to make business continuity a preventative role, but right now it's more reactive. Because we're at the beginning of the journey, creating response teams is the most important job. I'm hoping after this year we can move on to exercising and testing and then establishing our downtimes and getting more data."

Risk specialist, retail, USA

This year, there has been a marked change in the results of this question which place an even greater emphasis on having the correct people skills: experience is more important than academic prowess, relationship building is prioritised over granted authority, and professional qualifications mean more than academic qualifications. Last year's top result of 'process orientated' slips to midtable this year (11th place), while 'collaborator' moves from 15th place last year to 6th place this year. 'Being able to see the bigger picture' was towards the bottom of the table last year and moves up to 2nd place this year. This year's top answer, 'high level of experience' was only midtable last year, while last year's second placed answer, 'controlling', drops from second place to midtable.





It is important to notice the value placed on having lived experience rather than a high level of academic qualification which comes near the bottom of the list. While academic prowess is certainly advantageous in a resilience environment, it is practical, lived-in experiences which can help to provide a more rounded approach to risks and threats. Furthermore, having a professional qualification (where one has to demonstrate and understand practices and methodology) is seen as key requirement by more than 2.5 times the number of respondents (45.8%) to those answering an academic qualification is a key requirement (17.6%). Professional qualifications are most notably revered in African and Asian regions.

“There’s a definite shift towards soft skills rather than holding a degree or diploma in Australia. While formal qualifications may hold an applicant in good stead, it’s the ability to communicate, to lead, and to know the industry that is valued.”

Business Continuity Manager,
Human Services Sector, Australia

“The technical expertise of a practitioner is crucial for a manager in this space. Effectively running a resilience function demands a blend of hard and soft skills. Purely technical knowledge isn’t enough; communication skills are essential. You need to be able to train staff, engage with executives, and articulate complex ideas clearly. In a crisis, these soft skills often make the critical difference between successful management and potential organizational failure.”

Global business continuity manager,
professional services, UK

Please choose the top five most important attributes you feel are important for a business continuity manager in 2024

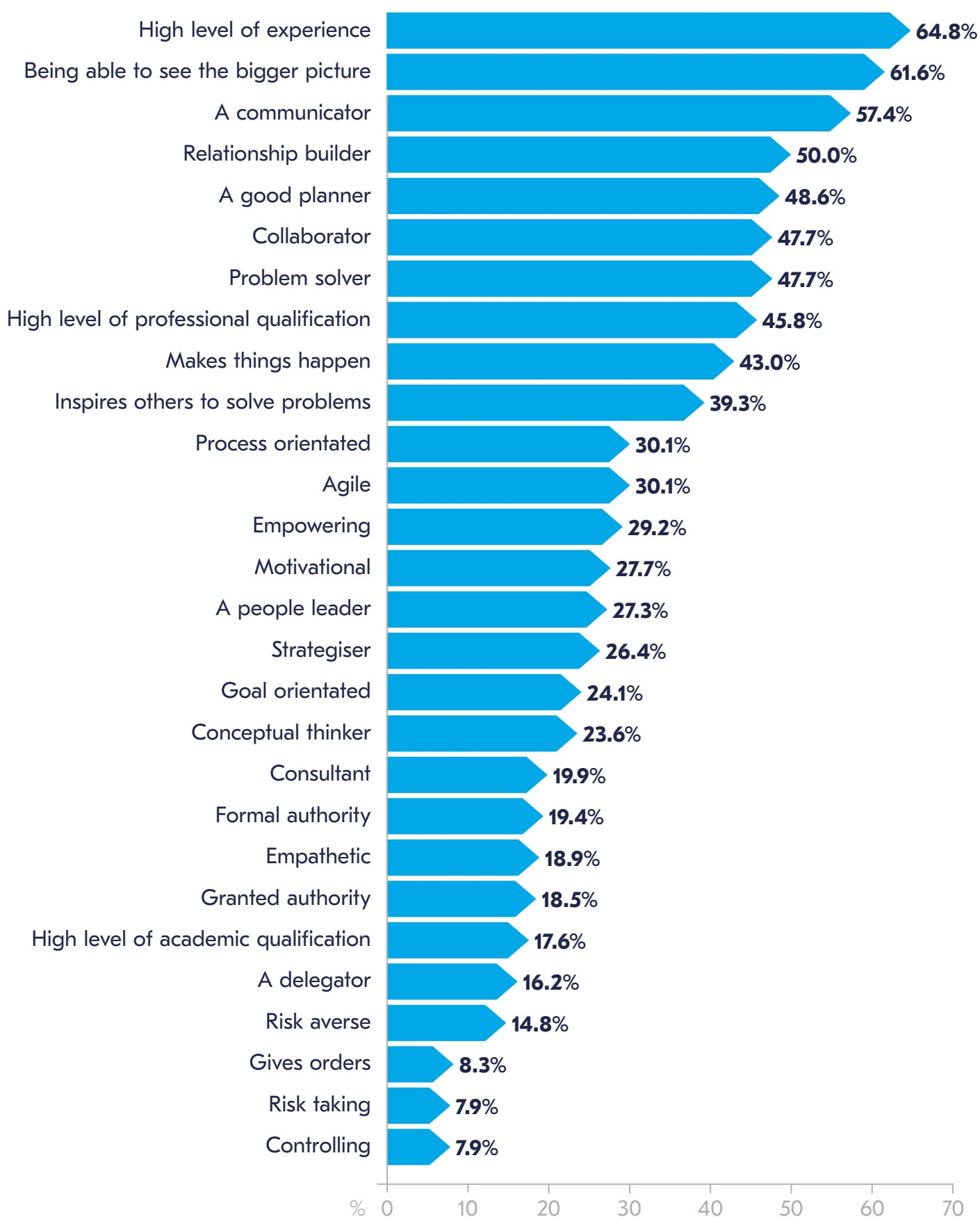


Figure 14. Please choose the top five most important attributes you feel are important for a business continuity manager in 2024

The same question was asked to respondents, but this time it was more about the skills required for a resilience manager. As has been demonstrated throughout this report, the lines between both roles are now more blurred than ever, and it is therefore of no surprise that respondents saw the top five attributes of a resilience manager as the same as for the BC manager. When questioned in however, interviewees did speak of differences and highlighted how the role of a resilience manager was more strategic and one that worked closely with senior management.

"I think the difference is that business continuity is an established discipline, with qualifications available for practitioners. Whereas resilience is a field that's in development and people are trying to work out what it means. The big difference is resilience managers need to be comfortable with ambiguity and they need to be creative and innovative to come up with the right answer for their organization, in particular in industries, where there is no operational resilience regulation. There's also more strategic thinking required of a resilience manager than a BC manager"

Head of business resilience, retail, UK

"I think the soft skills of a business continuity manager are needed to ensure we have a strong focus on education and lifting the awareness of threats. The resilience manager I see at a higher level, talking directly to the board at the strategic level."

ICT manager, public sector, Australia

As is demonstrated here, the most sought-after characteristics of BC and resilience managers selected by respondents are people skills. While technical knowledge is essential, it is the combination of technical expertise and soft skills that allow managers to effectively lead, communicate, collaborate, and adapt in the face of disruptions. Conversely, the location of 'gives orders' and 'controlling' at the bottom of the list for both BC managers and resilience managers highlights the importance of collaboration and the need to build a relationship of trust within teams.

"Soft skills are essential for business continuity managers and resilience managers"

Head of business resilience, retail, UK

Please choose the TOP 5 most important attributes you feel are important for a resilience manager in 2024

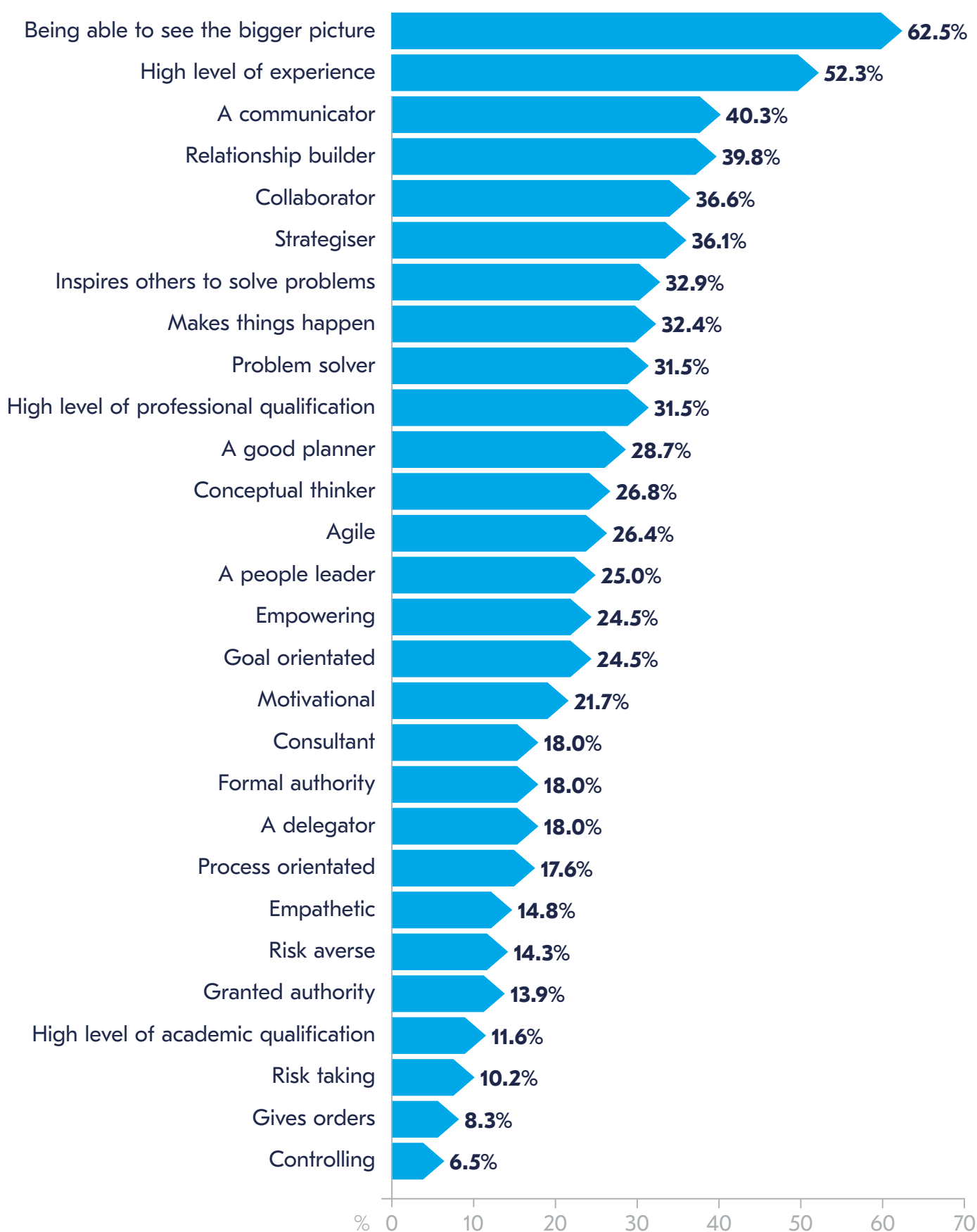


Figure 15. Please choose the TOP 5 most important attributes you feel are important for a resilience manager in 2024

A person's profile is shown in silhouette, facing right. The image is heavily layered with digital and technological motifs. Overlaid on the person's face and the background are various elements: a grid of orange and red lines, glowing orange circles of different sizes, and a complex network of lines and nodes. The background is a blurred cityscape at night, with lights from buildings and streets visible. The overall color palette is dominated by dark blues, oranges, and yellows. A large, dark blue arrow shape points from the left towards the person's profile.

Resilience in the new working environment

Resilience in the new working environment

- **Organizations are still behind in ensuring remote workers have the same levels of resilience applied to them offsite as they would expect in the office.**
- **Less than two-thirds (62.4%) ensure that resilience plans are there for remote workers, although 12.4% report that their organization still plans to put measures in place.**
- **Health and safety of remote workers scores marginally better, with 71.9% of organizations actively considering the H&S of those away from company premises.**

Remote or hybrid working is fast becoming the norm for most office-based organizations, precipitated by the COVID-19 pandemic, but now deeply ingrained into organizational structures. As discussed in previous editions of this report, these changes had implications for BC and resilience professionals who, in many cases, had to rewrite plans and organise departments so they could face both the nuances of post-pandemic working environments, as well as a challenging new risk landscape.

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. For resilience professionals, the new technology landscape can help to facilitate communication between previously siloed teams, enabling crisis teams to meet remotely without needing to be in the same physical location, and can also help to ensure crisis communications are managed effectively in remote/hybrid environments. Remote working also reduces dependence on physical infrastructure.



However, new working practices also come with a greater level of risk. An ultra-reliance on technology means technology failures can cause significant operational disruption and, with copper telephone lines being phased out globally, back-up channels can also be affected. Because of the changes, BC and resilience plans needed to be rewritten to cater for this, paying particular attention to the resilience of third-party IT providers, as well as the resilience of those working in remote environments.

Since the pandemic, this report has sought to determine if those working in remote environments enjoy the same levels of security as those in physical company buildings. Just shy of a quarter of organizations (22.9%) considered the resilience of remote workers before the pandemic, with the majority bringing in resilience measures either during the pandemic period (39.5%). An additional 5.7% actively planning to introduce it soon, and 6.7% planning to do so in future. This means nearly two-thirds of organizations now have remote workers covered by resilience plans (62.4%), with the figure increasing marginally on the previous year (60.9%).

Although 5.7% of organizations see the question as not applicable (e.g. home-based consultants or manufacturing sites) and 12.4% have plans to do so, it is concerning that one in seven organizations (14.3%) have no plans to make resilience provisions for those working remotely. Although this figure has reduced by five percentage points on last year, it is clear that there is some distance to go before universal adherence takes place.

"Our Standards of Resilience had to be extended to include workers now working from home since the adoption of our flexi-working module. Our communication process is tested twice a year for this reason because staff is key to our operating module."

Head of resilience, financial services, South Africa

"There are certain parameters expected from home workers. You must have a secure, safe location and our managers are allowed to ask to view it. We have working cameras for that reason. We have an ergonomic specialist that will go to staffs' houses to help with physical concerns too."

Downtime Resilience Team Lead, United States

"Colleagues who work in the office or remotely use the same IT kit, so if we have a technology failure the existing plans are the same for both. The difference is reliance on network, power and facilities. It's very unlikely that every single house would be impacted by a power cut or utilities issue. Our people are spread across wide geographic areas. If colleagues can't work from home, they will work from their office or from another of our sites."

Head of business resilience, retail, UK

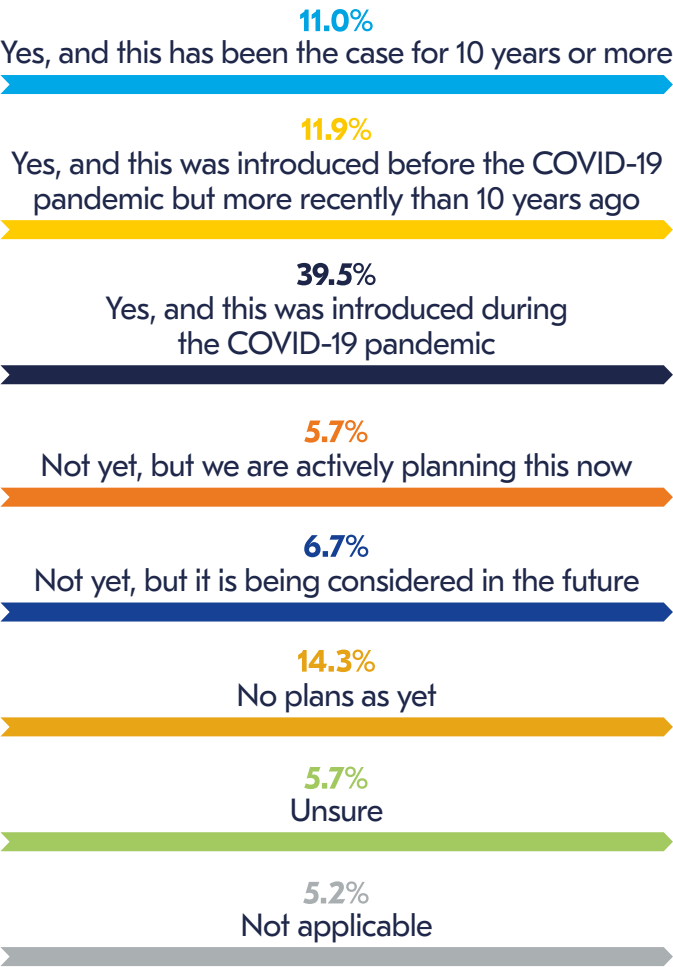
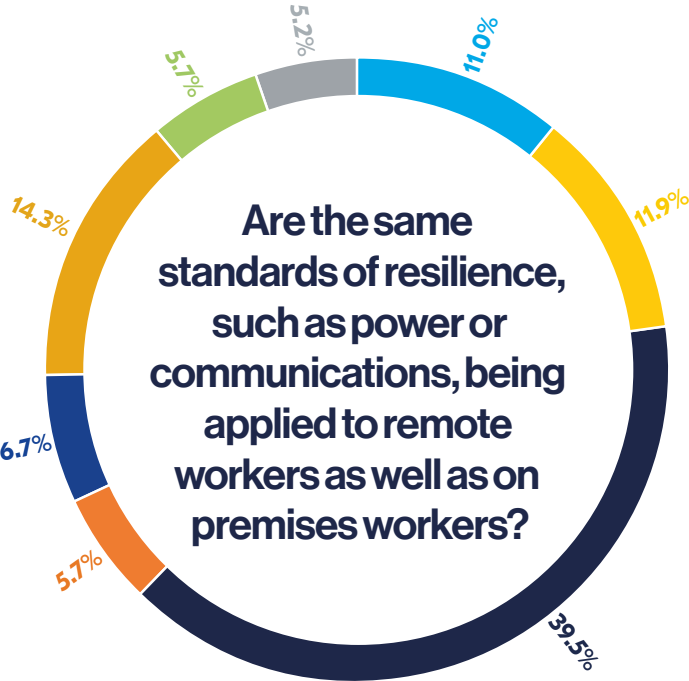


Figure 16. Are the same standards of resilience, such as power or communications, being applied to remote workers as well as on premises workers?

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. Here, the picture was more promising than the previous question, with the majority of organizations ensuring that measures were put in place; although to differing degrees.

The bulk of respondents (41.4%) stated that measures were exactly the same for remote workers as they were for office workers, a considerable increase of 7.2 percentage points y-o-y. A further 20.2% of respondents stated that health and safety measures were in place, but some improvement was needed, while 10.5% said that measures were there, but needed significant improvement.



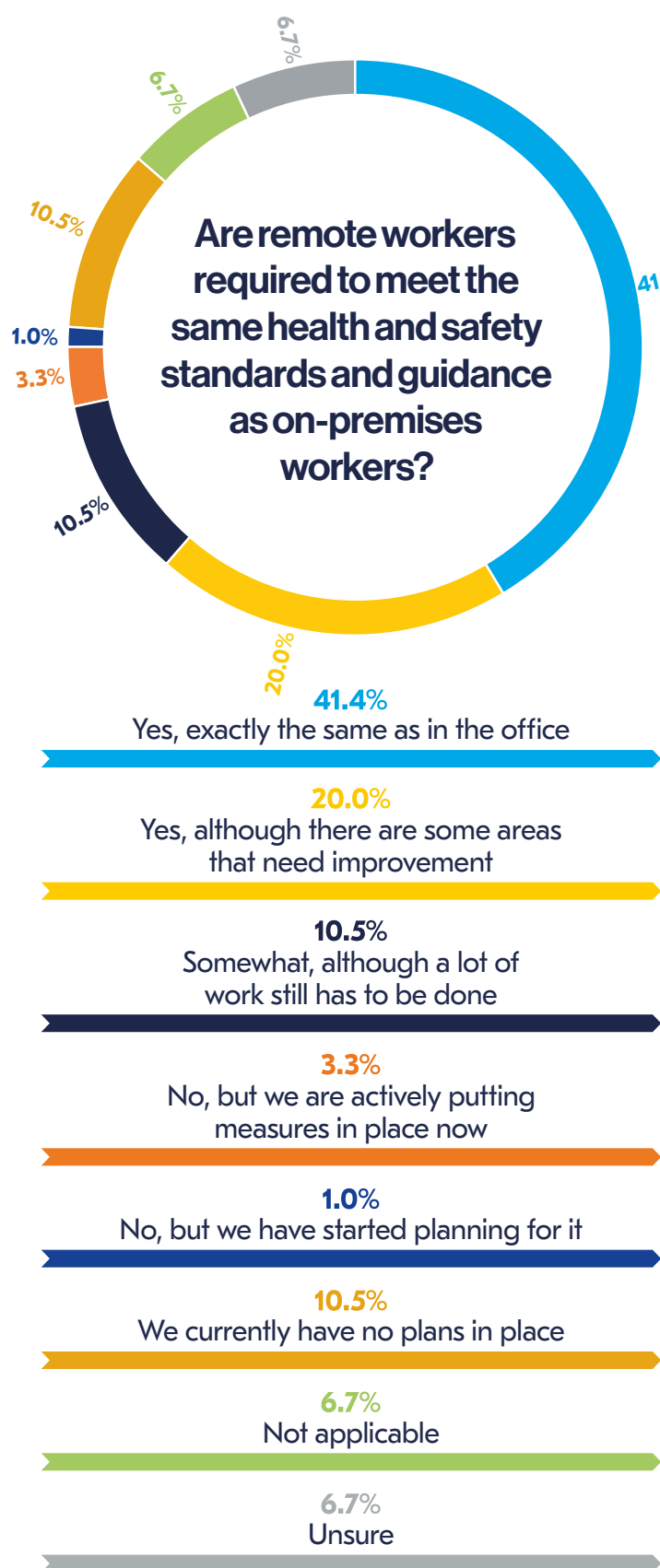


Figure 17. Are remote workers required to meet the same health and safety standards and guidance as on-premises workers?

The combined positive responses of 71.9% does, however, show a marginal decrease of 1.9 percentage points y-o-y. Although broadly similar, this is the second year in a row where there has been a reduction of organizations applying the same health and safety standards to remote and on premises staff, and suggests some complacency is starting to creep in as remote working becomes more established. Although the challenges and complexities involved in implementing and monitoring health and safety standards for remote workers can be difficult, it should be an obligation from every employer. While some countries such as the UK have mandatory regulations in place for remote worker safety⁷, others such as India do not yet have full legislation in place⁸ with decisions often coming down to individual company policies.

Finally, the survey looked at the practical steps organizations have taken to ensure the resilience of workplaces for both remote and onsite workers and, although there has been an increase this year in the percentage of organizations ensuring workplaces are resilient, many of the plans/activities focus on on-premise workers. This leaves home workers somehow unprotected.

However, overall, organizations are considering the threat of outages more seriously. Nearly two-thirds (63.8%) ensure that offices have power backups (an increase of 2.3 percentage points y-o-y), and nearly half (49.8%) ensure remote workers are provided with a plan in case of energy outage (an increase of 5.4 percentage points y-o-y). However, it is disappointing that 55.8% of organizations do not cover remote workers with the same protection as on-premise workers during an outage (an increase of 7.5 percentage points y-o-y), while only just over a quarter (27.1%) actively consider the risk of broadband outage for remote workers. Encouragingly, however, there has been an increase in the number of organizations providing back-up to critical workers in remote environments: 37.2% now do this, compared to 33.8% in 2023.

“Electrical power supply failures are a known risk in many markets globally, and South Africa and Southern Africa are known for this ongoing risk that can easily impact business operations and any network/communication services quickly. Entities responsible for the consistent supply of electrical power, even though dealing with many challenges, have implemented recovery strategies in the form of load shedding schedules. Fortunately, due to various back-up and recovery strategies, load shedding has not impacted our operations and communication solutions at this stage. Regulators and Central Banks acknowledged the risk and partnered with all financial institutions to build a centralised solution in the case of a prolonged power outage, which in many markets is a likely risk. Mobile networks and technical infrastructure would definitely be impacted, so we’re looking at alternate technical solutions to ensure staff communications and continuation of operations beyond our current tolerance limits. In addition, we have prepared staff for worst case scenarios in the case of communication failures, which includes certain advisable actions to take and important safety advice because of the security volatility in Southern Africa.”

Head of resilience, financial services, South Africa

“We have warm back up sites with caches of equipment for technical and operational people to access in case of evacuation. The common denial of access threats relate to flooding, cyclones and bushfires.”

ICT manager, public sector, Australia

“All cloud-based service providers that work with us are required to have their technology infrastructure located within Australia”

ICT manager, public sector, Australia



Considering some of the events that have happened in the past few years, how are you ensuring that your workplaces (on-premises and remote) are resilient?

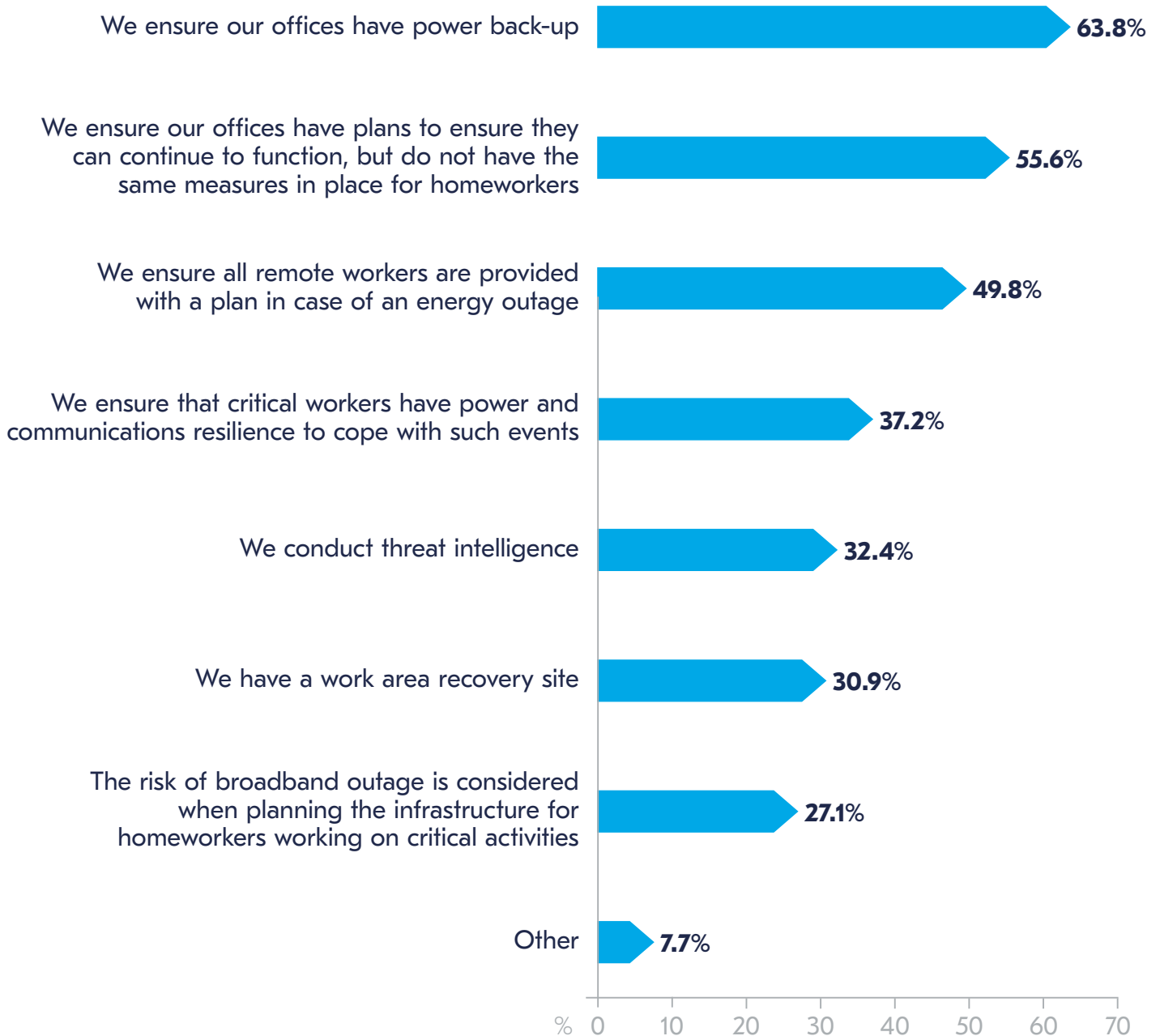


Figure 18. Considering some of the events that have happened in the past few years, how are you ensuring that your workplaces (on-premises and remote) are resilient?

Technology & business continuity



Technology & business continuity

- **Emergency communications software is the technology that is most likely to be used by practitioners. A 42.8% adoption rate – a rise of 5.1 percentage points on the previous year – shows that organizations continue to invest in the software in order to ensure it best fits organizational needs.**
- **Risk assessment software has also seen a large increase in usage this year, from 15.4% last year to 23.2% this year as practitioners seek to gain more control over the fast-changing risk landscape.**
- **AI-tools still have a fairly low level of adoption – 7.2% - but this is like to rise sharply over the next few years as practitioners report a thirst for adopting applications of AI in their resilience programmes.**

In today's working environment, it would be a struggle to find any organization that does not use technology in some way to ensure its resilience. Virtual crisis rooms, AI-based mining of big data to determine disruption trends, supply chain mapping, and business continuity management software are just some of the ways that technology is helping professionals to better understand the risk landscape, be proactively prepared for incidents, manage incidents, and learn from incidents that have affected the organization or close peers.

"Innovation and digitisation have been our objectives for many years with set targets and will remain a primary objective for us for years to come to continue improvement of our automated operation to stay competitive in the market and continue to lead the way."

Head of resilience, financial services, South Africa

To better understand the different uses of technology in resilience settings, respondents were asked about the technology tools they were using for the planning and/or administration of BC/resilience activities within the organizations.

Emergency notification software remains the most widely adopted tool among practitioners and, with a 42.8% adoption rate, is a 5.1 percentage point increase since the previous report. After the relative plateauing of take up in tools, organizations have been increasing their investment in emergency notification software since the pandemic to ensure tools are suited to new ways of working (e.g. a tool with functionality to contact remote workers, satellite communication back-up in case of an outage). In second place, 38.1% of organizations now use team collaboration tools (up from 32.1% in 2023), pointing to higher rates of remote/hybrid working, and also perhaps symptomatic of company cost-cutting measures by abandoning some physical meetings in favour of remote ones.

Meanwhile, the popularity of in-house developed solutions has fallen slightly this year: less than a quarter (24.2%) of organizations report developing their own in-house solutions for business continuity and resilience, down from 34.4% in 2023. Viewing this positively, this could mean that solutions available on the market are becoming more aligned to practitioner requirements, or allow the versatility to integrate with existing software solutions. Furthermore, with the increasing functionality of existing enterprise software solutions (such as Microsoft Copilot), some practitioners are starting to exploit this newer functionality rather than invest time in building in their own solutions to existing software.

Perhaps in a further tick to the increasing functionality of software-based solutions, the use of risk assessment software has risen from 15.4% in 2023 to 23.2% this year. Risk assessment software is now developing to include AI-related functionality, using big data (both from internal and external sources) to build a comprehensive view of the risk landscape), as well as offering integration into existing tools used by organizations. Some organizations are leveraging multiple data sources and data mining tools to create detailed risk profiles and identify emerging risks.

“Our centralized risk management tool is a system that we use where all risks are reported for control and management. All control documents such as our business impact analysis, business continuity plans, crisis management plans and playbooks are uploaded and managed online. This allows for a consolidated view for easy gap analyses and risk identification and is available to all authorised personnel.”

Head of resilience,
financial services, South Africa

“We used to have business continuity planning software that was a legacy solution, which didn’t work for us anymore. We bought a new system that has a better user interface and wider range of functionality, including resilience, crisis management, and emergency notifications, so it’s all in one place and easier to use, including on mobile devices. The change has been a real enabler for our organisation.”

Head of business resilience,
retail, UK

Despite it becoming earning buzzword status in 2024, artificial intelligence (AI) applications have a relatively low adoption rate in resilience settings with just 7.2% of organizations saying they use this technology. This is the first time the question has been asked, however, and it is likely that usage has increased significantly year-on-year. Furthermore, some tools have AI-functionality embedded in them (e.g. Google Maps can be a good source for viewing disruption hotspots in city infrastructure) and the true figure may be higher.

"Artificial intelligence is something new to us. We have rolled it out in a lot of our products and markets, but it's not yet something that's managing our operation as we would like it to. Huge investment and effort are put into this piece of our operation."

Head of resilience, financial services,
South Africa

A large percentage of respondents (23.3%) said they used "other" tools, but this was dominated by comments about spreadsheets being used. Using spreadsheets is often a natural solution: tools such as Excel have widespread legacy use, functionality is familiar to most workers, and working models have been built-up over time in spreadsheet format. They can also offer a more cost-effective solution to organizations that do not have the funds to invest. However, caution should always be maintained: manual data entry can lead to data entry mistakes, files are sometimes stored on personal drives with sharing functionality disabled (leading to multiple, different versions), the complexity and volume of data created can lead to insufficient storage capabilities, and there may be issues with spreadsheets integrating with other corporate technology.

"Unfortunately, there is little appetite for the use of technology for business continuity planning in our organisation. We have challenges with legacy technology solutions that are the higher priority. Microsoft Excel spreadsheets are used to capture Business Impact Analysis (BIAs) and our business continuity plans are compiled in Microsoft Word documents."

Business Continuity Manager,
Human Services Sector, Australia

"There's no budget for technology right now, so we track our business continuity plans using spreadsheets."

Risk specialist, retail, USA



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

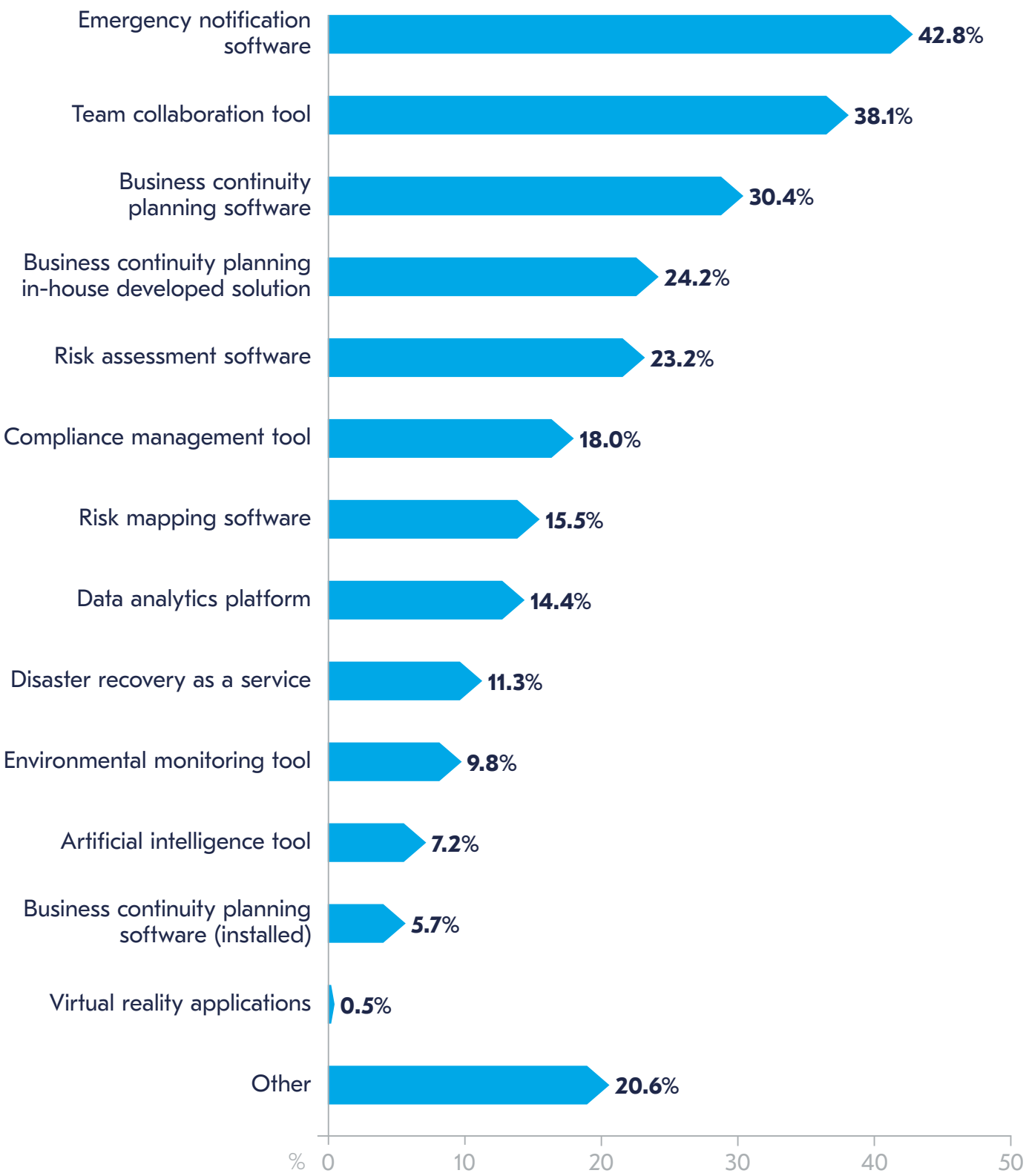


Figure 19. What technology/software do you use in your organization for BC/resilience planning and/or administration within your organization?

Organizational support for BC and resilience



Organizational support for BC and resilience

- **Management is releasing more funds to invest in resilience programmes from a financial and resource perspective (39.9%), or from a resource or financial perspective only (24.2% and 5.1% respectively).**
- **Nearly half (49.2%) plan to increase collaboration with senior management to ensure support continues.**

A resilience programme can only be successful if it can achieve the support of everyone in the organization, and championed by the top levels of management. With organizations facing significant challenges to their resilience in 2024, those in charge of resilience programmes are seeking both monetary support (e.g. for investment in technology) and support from a resource perspective (e.g. extra practitioners).

Encouragingly, more than two-thirds of organizations (69.2%) say they will either get increased financial and resource support (39.9%), from a resource perspective only (24.2%), or from a financial perspective only (5.1%). This represents an increase on last year's figure of 66.7%, with those seeing both extra financial and resource support seeing the greatest rise by nearly four percentage points. With just 22.2% saying there will be no change to the level of support given (18.7%) or a reduction in support (3.5%) — a reduction of 3.5 percentage points on last year's report — it seems as though practitioners are feeling more positive about the support they are getting for resilience programmes, and also suggests that inflationary pressures of a year ago, leading to tight control on spending, are starting to ease. This was also commented on in practitioner interviews carried out for this report.

"We've seen increased support for business continuity and resilience over recent years, especially since 2020/2021 during the pandemic which provided many lessons learnt across markets globally. Lessons that already led to improved controls and regulation. One of the most important lessons learnt was 3rd party service dependency."

Head of resilience,
financial services,
South Africa

"In the last few years, we're starting to get more buy-in and COVID had a lot to do with that. Additionally, the increased risks with cybersecurity have raised our profile. We've seen multiple hospitals in our area impacted by cyber-attacks that have taken them down for well over a month, and their recovery took upwards of six months to a year. Things are shifting and we're starting to see more engagement. I can see at some point this becoming something that the board takes more interest in."

Downtime Resilience Team
Lead, United States

"Senior management attention to business continuity and resilience is high already and continues to grow in our organisation because the external operating environment is volatile. Climate change, geopolitics, and cyber risks pose strategic threats to most businesses. We don't see business resilience as just an operational discipline. It is part of the organisation's business strategy and front of mind for our executives."

Head of business
resilience, retail, UK

However, this is not necessarily the case in all organizations — one interviewee felt there was still very little understanding of risk at senior level, and in his perception, financial support was not forthcoming for resilience programmes. This differs from the views in other quotes on this page, and shows the importance of fostering an understanding of risk and resilience (and the differentiation between the two) to ensure relevant financial support can be sought.

"There are very few people in the C-Suite that either understand what risk actually is or have the time to include it into everything else that's going on, so you end up with a business continuity manager and nobody to take an executive decision. This means the budget is not going to be there, the culture is not going to be there, and the risk is not understood from a non-financial perspective."

"I've seen reduced financial and resource support. Organizations will always look at how to provide a better return and cut away functions that are not being used at the time. Unless a problem occurs, business resilience isn't always seen as required, so the function is cut."

Consultant, security sector, UK

“We’ve seen increased support from a financial and resource perspective. We have people higher up in the organisation who are championing us and working very hard to get what we need. It’s just that the funds aren’t always there.”

Risk specialist, retail, USA



“We’ve got a really engaged board. They take part in our annual crisis management exercises for the strategic level. They also have regular updates on the progress of resilience programmes, such as cyber resilience, security of supply chain, or progress towards business continuity planning.”

Head of business resilience, retail, UK

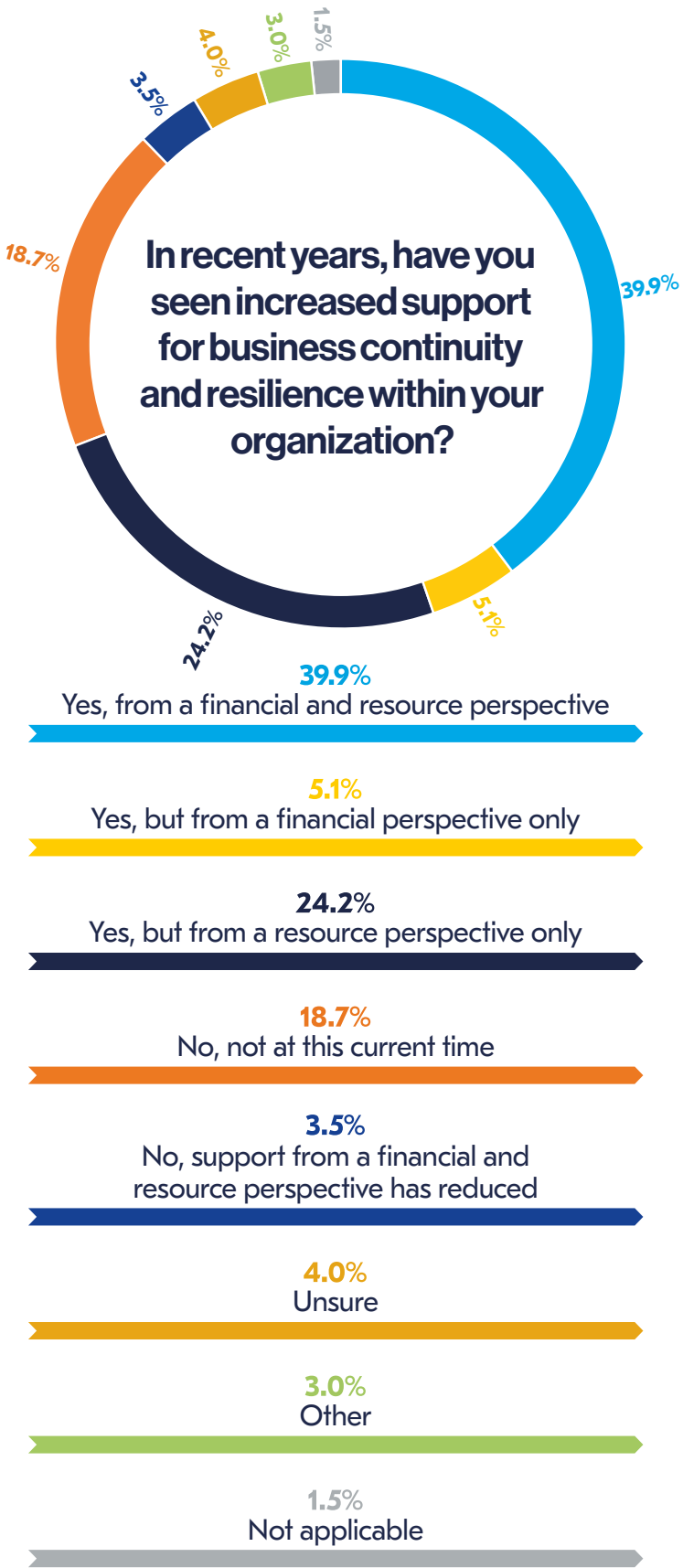


Figure 20. In recent years, have you seen increased support for business continuity and resilience within your organization?

Measures to increase awareness and engagement of BC and resilience are on the rise

Even though support for resilience programmes is increasing, ongoing awareness building of the need for continual improvement is needed to ensure support continues going forward. Perhaps indicative of the higher levels of support witnessed in the previous graph, the following graph shows an almost universal increase across the board when considering the different steps practitioners are taking.

Greater collaboration between teams tops the table again this year, with nearly half (49.2%) saying they will consider this going forward – a near three-percentage point increase on the previous year – and indicative of the increasing awareness of the importance of team collaboration. This was also evidenced in the technology section of this report which showed an increase in the use of collaboration software.

Ensuring regular training and exercising programmes are in place moves to second in the table this year (45.1%), up from fourth place last year and an increase of nearly seven percentage points on the previous year. Gaining the muscle memory to know what to do when an incident occurs in an organization is vital to achieving a successful outcome, and organizations have reported that COVID-19 introduced newfound enthusiasm amongst senior management members who were keen to ensure staff were better prepared for future crisis. The emergence of new training techniques (such as microsimulations, micro-learning, and AI-assisted scenario planning) is helping to ensure training can be delivered more effectively, while taking less time away from business activities. In fact, an additional 30.3% of respondents said they will be using technology to do just that – up two percentage points on the previous year.

“In not-for-profits, teams have challenges finding time that’s not used for client-facing work, so micro-learning or micro-scenario exercises are something I am designing for our teams. Having a qualification in education, including innovative learning design is a bonus for our organisation. I have found micro-learning helps those reluctant to dedicate time to participate either online or offline in their own time.”

Business Continuity Manager,
Human Services Sector, Australia

“Part of our new policy is mandating training for certain higher levels of the organization on a rolling three-year basis, and we’ll have more training for operational teams in the service recovery plans. The next step is working with our internal learning and development team to develop something that’s professional and auditable.”

Head of Emergency Planning and
Resilience, public sector, UK

“My organization has very fully embraced artificial intelligence and has their own AI. The two elements that I personally find AI useful for are scenario creation and time-saving in communications.”

Global business continuity manager, professional services, UK

In recognition of the importance of having buy-in from the top to support a successful resilience programme, the increase in responses to those who are looking to 'ensure a direct reporting line to the c-suite/executive team' (2024: 43.6%; 2023: 33.7%) and 'having the c-suite/executive team involved in the BC lifecycle' (2024: 42.1%; 2023: 31.3%) have both seen significant rises by ten and eleven percentage points respectively.

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



Figure 21. What methods will you consider going forward to raise awareness and/or increase engagement of BC within the board?

**Looking ahead
– what's next for
the future of our
industry?**



Looking ahead – what's next for the future of our industry?

- **Senior management tops the table: 86.9% of those questioned believe senior management attention will become more important over the next five years.**
- **After-action reviews (AARs)/post-incident reviews (PIRs) see a big rise to fourth place on the table as COVID-19 demonstrates the importance of reflecting on the successes and inhibitors to a successful incident response.**
- **As operational resilience deadlines near, operational resilience (79.3%) leapfrogs organizational resilience (73.2%) in terms of importance over the next five years.**

Our industry has changed dramatically over the past five years with the influx of new technology, new resilience regulations, new working environments and patterns, and a fast-changing risk landscape. The importance of cross team collaboration has come to the fore, as has the appreciation for the support of senior management to ensure a unified approach to resilience programmes.

"When I first started out, many years ago, business continuity was seen more as a box ticking exercise than a risk mitigation, but as crises happen more regularly, they impact people more directly and they can be seen daily within all streams of media, it's a lot easier to promote action. COVID was the big one that everyone is familiar with, but most weeks there is some kind of incident, and as a result people are proactively seeking advice on what can be done to make themselves more prepared."

Global business continuity manager,
professional services, UK



To ascertain exactly how practitioners see this developing in the medium-term, practitioners were asked to choose which aspects of BC and resilience they consider would have more or less importance over the next five years.

Once again, it is collaboration and board/ leadership team involvement which practitioners consider as having increased importance over the next five years. Indeed, 86.9% of those questioned believe that the importance of senior management attention will rise over the next five years (2023: 84.0%), while a further 84.3% believed this would translate into increased support for BC and resilience processes, a significant increase on last year's figure of 77.5%.

In terms of collaborative processes, 'cross-team collaboration' is considered to have increasing importance by 81.8% of respondents. This was in top spot last year, and represents a four percentage-point drop on 2023. This should not, however, necessarily be viewed negatively. Respondents have explained just how much collaboration has increased over recent years, to the extent that some believe they have already reached best practice — and have little room to collaborate more than they do already. However, an interviewee from the public sector spoke about how they did see space for improvement, and they considered this to be an aspect which would see heightened attention in the mid-term. Another interviewee described how they felt BC was still at a very foundational level in their own organization and others within the not-for-profit sector. For them, the next five years would be focused on education and awareness and promoting a more collaborative culture.

"Over the next five years I see public service agencies continuing to strengthen business resilience through broader collaboration across multiple organizations, both public and private."

ICT manager, public sector, Australia

"It's now about bringing all the team members onboard to better understand how their team can become more resilient and to look beyond their own part of the organisation. I think the COVID pandemic really helped to reshape the value of resilience. We now have more buy in, but challenges still exist in the human services sector which is often geared towards simply reacting to emergencies."

ICT manager, public sector, Australia

**"In Australia, especially in not-for-profits, business continuity is at a foundational level and many organisations are still developing their programmes. Our focus over the next five years is equipping people with knowledge and skills required, as well as completing foundational workshops to ensure we have BIAs and BCPs covered. Our team will be shifting our focus to education and awareness around resilience. To do this we need to influence and change the culture from the leaders to the employees...
...We have an ambitious 3-year business continuity programme and while there is a lot to get through, it's working. We're building rapport, relationships and catering for the needs of the teams. This person-centred approach that I adopt is worth the time investment."**

Business Continuity Manager,
Human Services Sector, Australia

“One of the problems we need to address is silo working. It’s a big impact historically because the organization it’s so large that it’s split up into five directorates. We’ve got a lot of service areas named in business continuity plans, but without cross team collaboration we don’t know if they have resources now. We are moving away from it, but it’s still there lingering in the background.”

Head of Emergency Planning and Resilience, public sector, UK

“Cross team collaboration is important. Working in a vacuum means departments don’t know how to interact with each other and we miss the bigger picture of the organization’s operations. Understanding workflows among each of the departments is critical to be able to continue those operations. We’re looking at workflows and who touches what for a given workflow and how critical is it. That’s where cross team collaboration is absolutely critical.”

Downtime Resilience Team Lead, United States

In the light of extensive reviews taking place around the response to COVID-19 — perhaps driven by increased media attention on reviews taken by national governments and academic reviews of the global response⁹ — nearly three-quarters of respondents (74.1%) believe the post-incident/after-action review (PIR/AAR) will have increasing importance over the next five years. Qualitative comments by respondents also show how the importance of a truly holistic approach to the PIR/AAR; ensuring everyone who had some part to play in the response is included in the review process.

Meanwhile, operational resilience has leapfrogged organizational resilience in terms of importance for organizations over the next five years, almost certainly driven by incoming regulation for financial service organizations and their critical third-parties. With the UK, EU, and Australia seeing implementation deadlines looming in 2025, the United States now beginning their journey into regulated operational resilience, and other nations adopting operational resilience principles as best practice, the increased importance put on operational resilience is to be expected.

“Operational resilience is the strategic side that I can see evolving over the next five years, due to incoming regulations.”

Head of resilience, financial services, South Africa

Agility and adaptability of plans is another area that practitioners believe would see heightened attention over the next five years, with 71.2% answering positively. This particular point also garnered significant discussion in interviews, with some explaining how increasing volatility and ‘unexpected’ incidents meant an adaptive and agile approach was crucial to ensuring there was cover for all types of crises, including the unexpected.

"Supply chain mapping, adaptability of plans will continue to evolve over the next five years. Our supply chain is absolutely core to our ability to serve our customers. Cyber, geopolitics, and climate change are trends that are not just relevant to our organisation but for our suppliers too. Together we build plans to be able to pivot and adapt to disruptions as and when they happen."

Head of business resilience, retail, UK

Other interviewees spoke about the increasing importance of data, both for trend and disruption analysis/management, but also to be used in planning to ensure organizations can gain a comprehensive picture of how the risk landscape will develop. Others felt that by consolidating guidelines for all incident types using big data techniques, it would enable them to adopt more incident-agnostic approaches rather than having specific plans for specific types of incidents — which need constant revision and can be very time-intensive. This in itself is another point picked up in the graph — the importance of incident-specific plans was towards the bottom of the table, with 12.1% believing they would have less importance over the next five years — one of only three options where more than 10% of respondents believed importance would decline. However, there are still some practitioners who value incident-specific plans: one interviewee spoke about how incident plans were, in his view, increasing in importance due to the repercussions of poor plans during the COVID-19 pandemic.

"Incident agnostic plans (also called all-hazard plans) are the ones we invest more time and effort in and that we test systematically across all the business. They are designed to give the teams a range of options during disruption."

Head of business resilience, retail, UK

"We're looking at more generic plans because whatever the reason — cyber, flood, power outage, your contractor pushed the wrong button — the risk is in the loss of the function and how it impacts the organization."

Head of Emergency Planning and Resilience, public sector, UK

"Threat analysis is really important and something that will continue grow over the next five years. The team that helps us detect early trends and carries out horizon scanning feeds into our test and learn programme. While many of our plans are scenario agnostic, our test and learn is scenario specific. We use our threat intelligence capability to design strong plausible scenarios for our crisis management and business continuity testing simulations."

Head of business resilience, retail, UK

“Over the next five years I see the importance of incident specific plans changing, specifically pandemics as they regularly develop and having an incident specific plan keeps the workforce functioning. Also, operational/ organizational resilience will be important because they feed into one another. If you have a good business impact assessment, followed by a very good operational plan, it will lead to good organizational resilience.”

Consultant, security sector, UK

“Over the next five years I think more attention will be given into crisis management because I believe that instead of including everything under the umbrella of simplifying and cutting out of “identified unnecessary steps of processes”, Crisis management plans need more data, guidance notes and critical data inclusion. Risk/incident/crisis/disruption management requires as much as possible data and SME involvement to manage the point of attention effectively. Crisis management plans are, or should be, the consolidated guidelines of all possible and likely scenarios a business should be able to address effectively to ensure continuity.”

Head of resilience,
financial services, South Africa

Another option where a notable proportion of respondents said its importance would decline is that of the BIA: 8.5% believed its importance would decline. Some of this may not necessarily equate to the importance of the BIA itself, but the actual process. Some interviewees spoke about how they were already using AI to assist with the BIA process which was actually helping to accentuate its importance to the wider business. However, there were still some interviewees who still believed that AI was not the key to a successful BIA and that it should be used with caution — particularly since AI currently relies on the information that it is fed, rather than having any reasoning capabilities.

“I use AI and it has already helped me significantly. For example, I use it to research effective marketing campaigns to address engagement, make text more concise, track notes in meetings, and suggest ideas for tabletop exercises in a healthcare setting. Even though I might already know some of the answers, using artificial intelligence helps me see different answers that maybe I wouldn't have come up with. I would like to see a way to leverage artificial intelligence to conduct BIAs in a more efficient manner.”

Downtime Resilience Team Lead, United States

“I don't think artificial intelligence will make performance of BIAs easier for organizations. I am not fully supportive of complete AI based operations, because effective trust in technology is still dependent on the feed of 100% accurate data. Automation and digitisation provides a very specific service easily adopted by the end-user, however the aim with AI is for computer systems to be capable to perform complex tasks, historically only a human could do, which includes but not limited to reasoning (risk analyses), making decisions and/or solving problems. Accurate outcomes are very dependent on accurate and effective input.”

Head of resilience, financial services, South Africa

Considering the different aspects of business continuity and resilience, how do you see the importance of these aspects changing over the next five years?

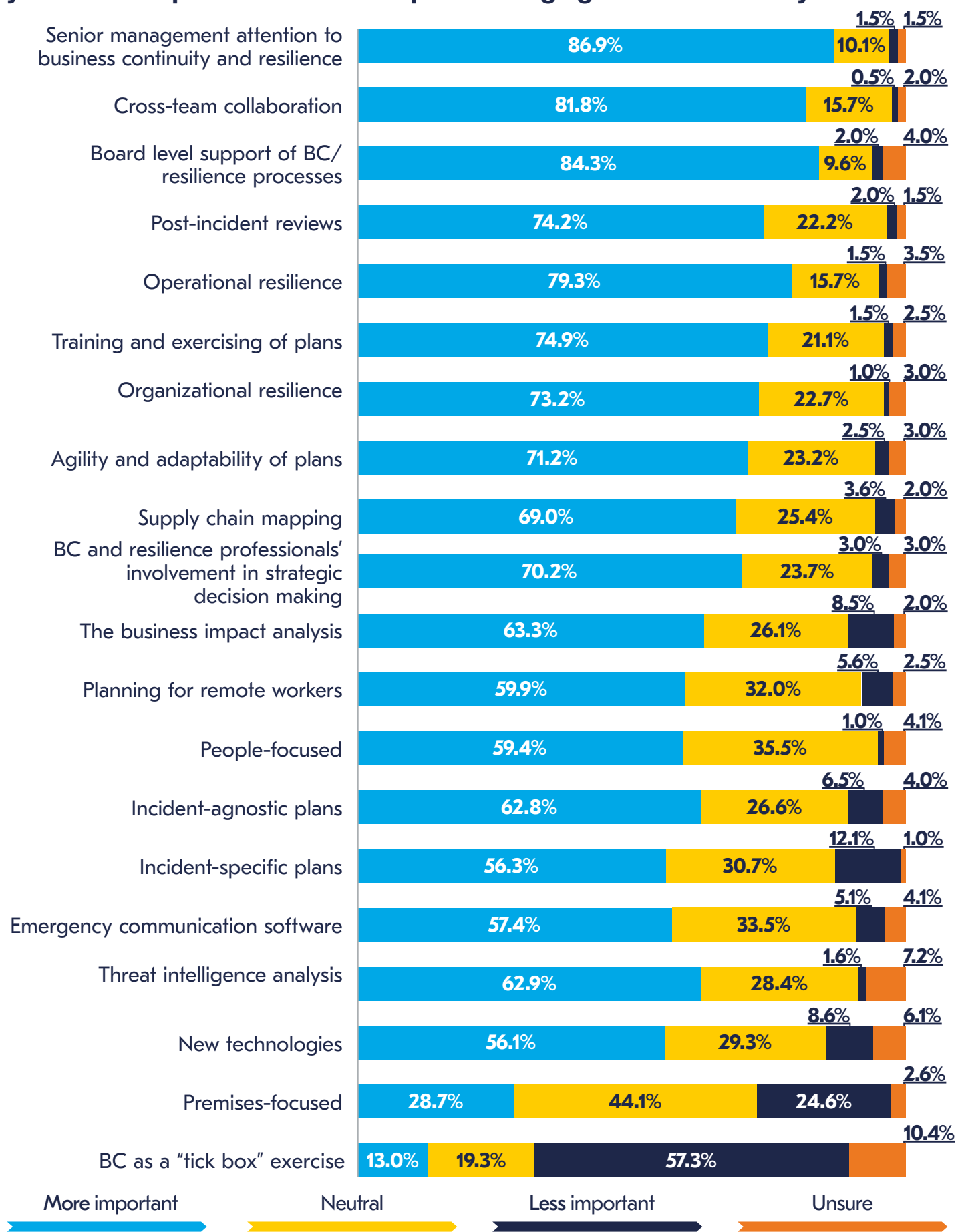


Figure 22. Considering the different aspects of business continuity and resilience, how do you see the importance of these aspects changing over the next five years?

Annex



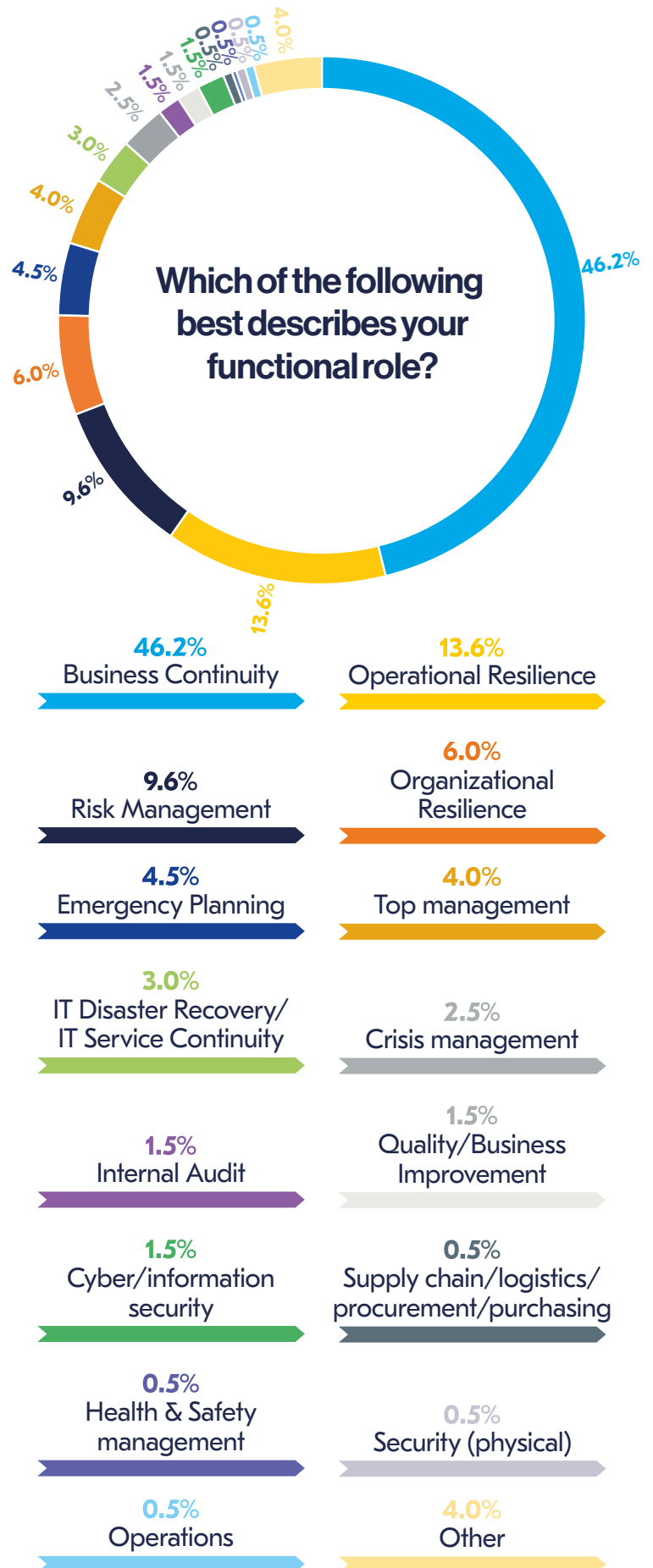


Figure 23. Which of the following best describes your functional role?

243
Respondents

43
Countries

23
Sectors

10
Respondent
interviews

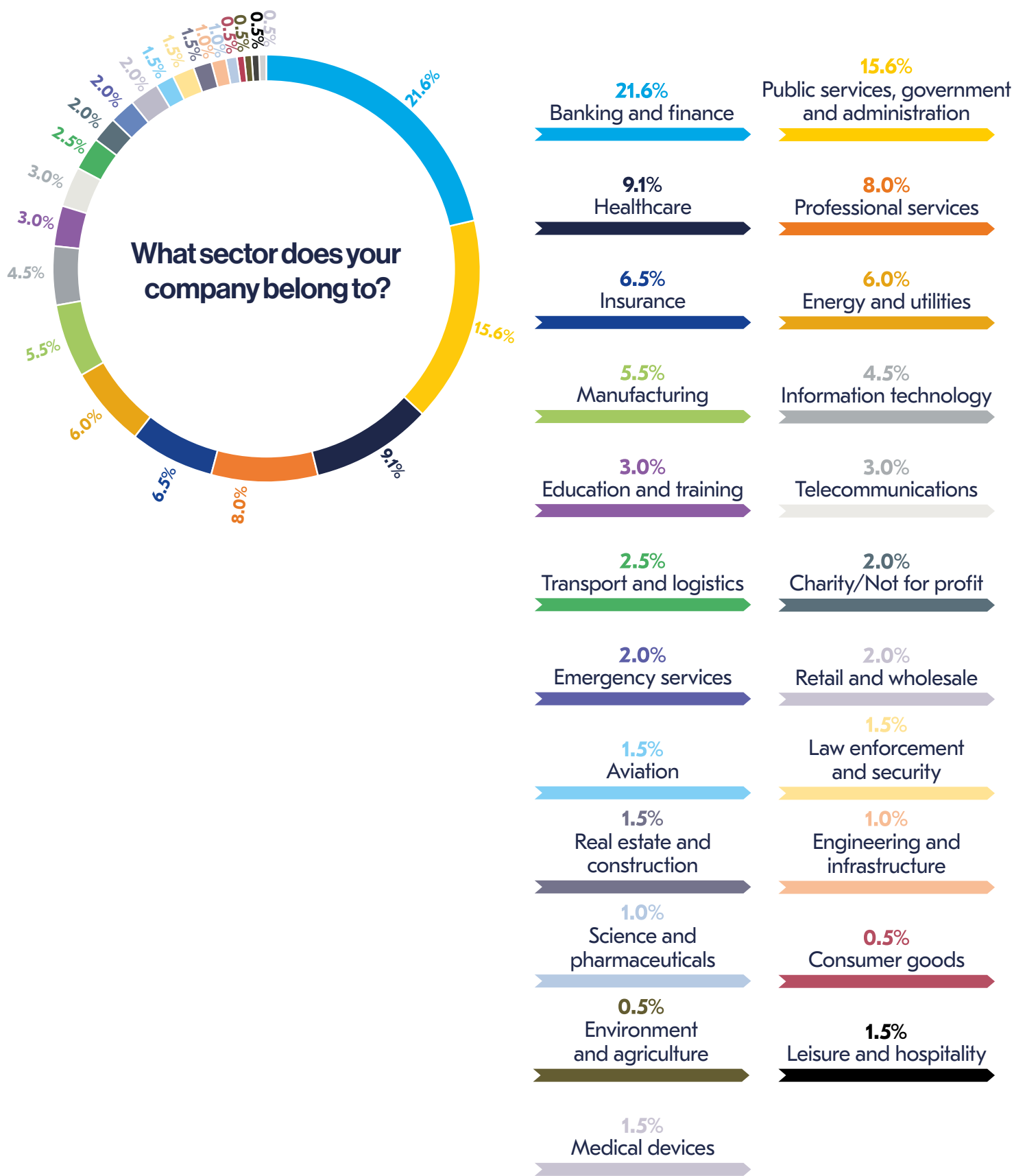


Figure 24. What sector does your company belong to?

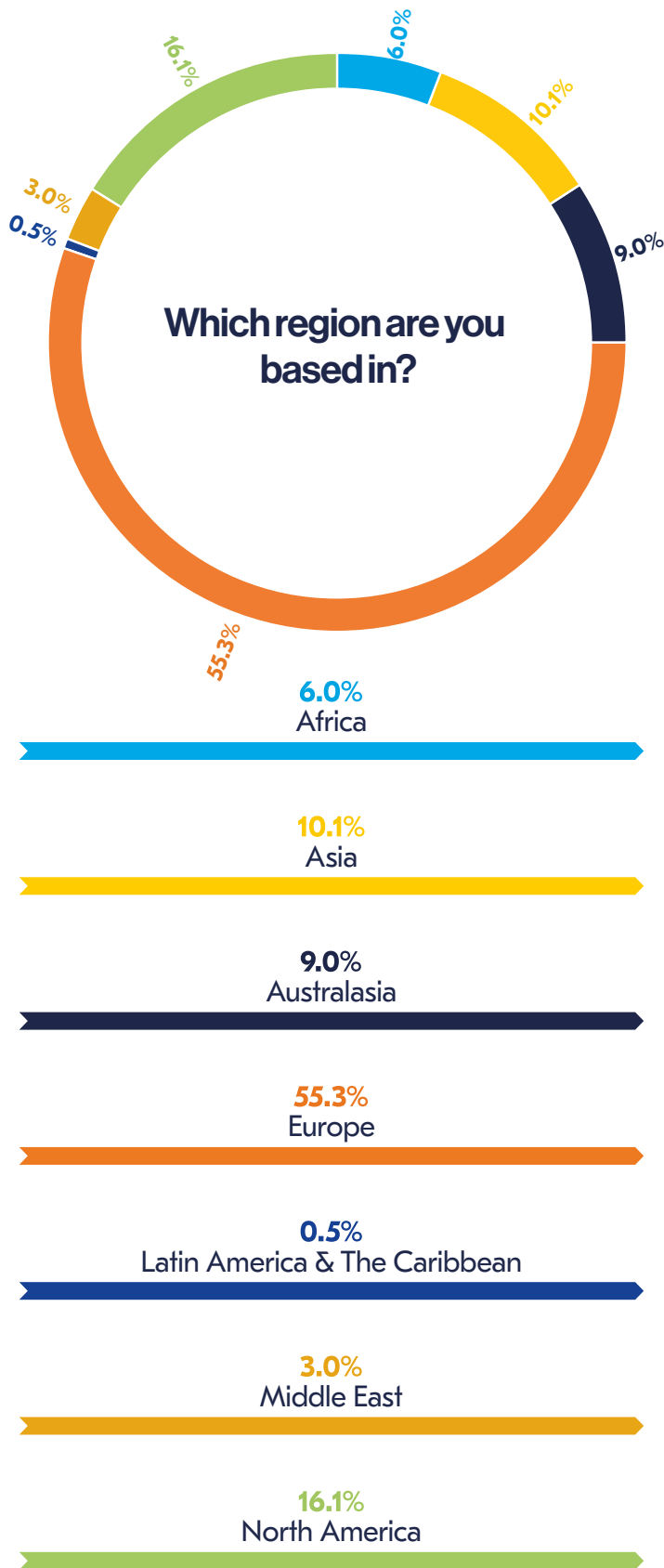


Figure 25. Which region are you based in?



How many countries does your company operate in?

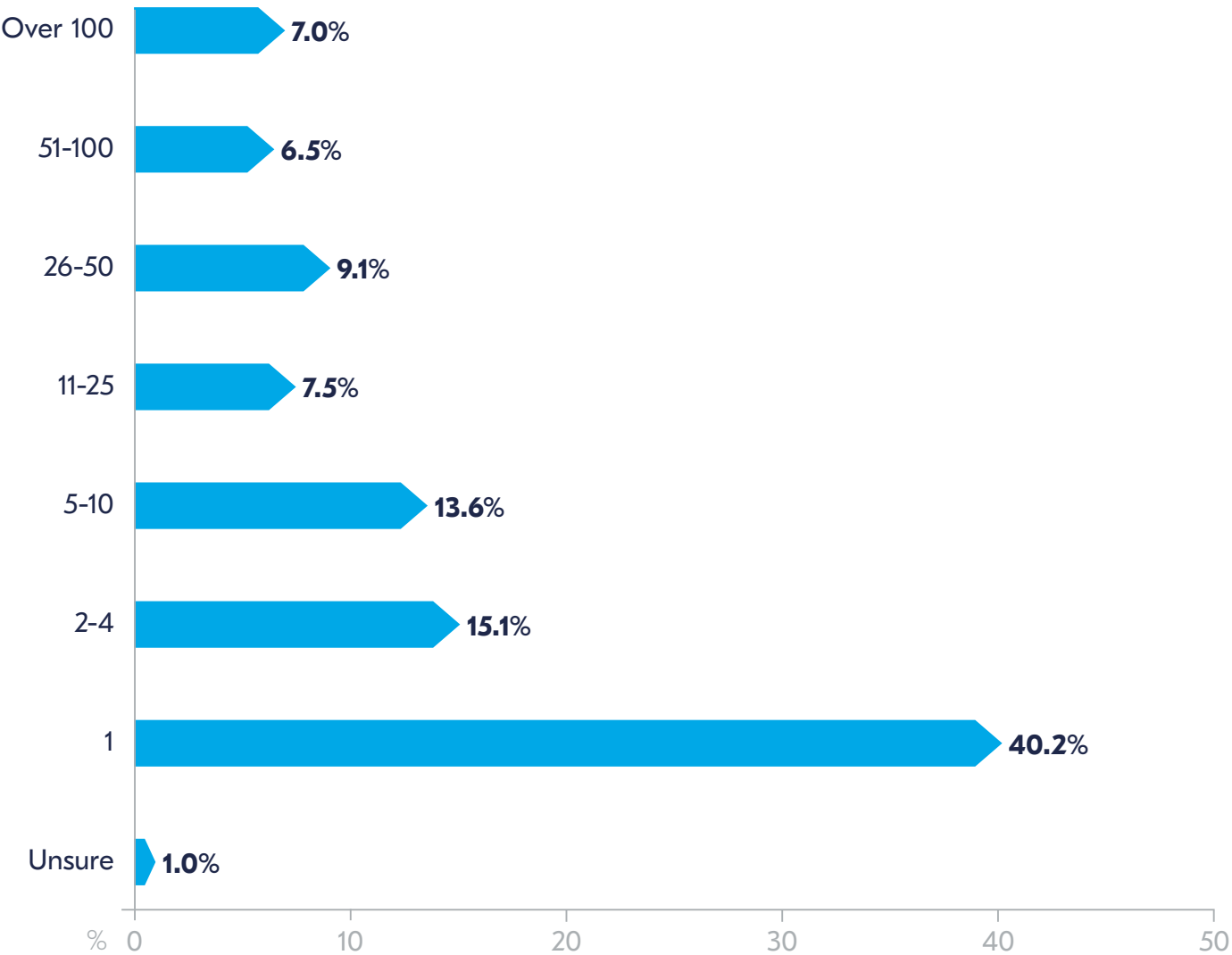


Figure 26. How many countries does your company operate in?

Approximately how many employees are there in your organization globally?

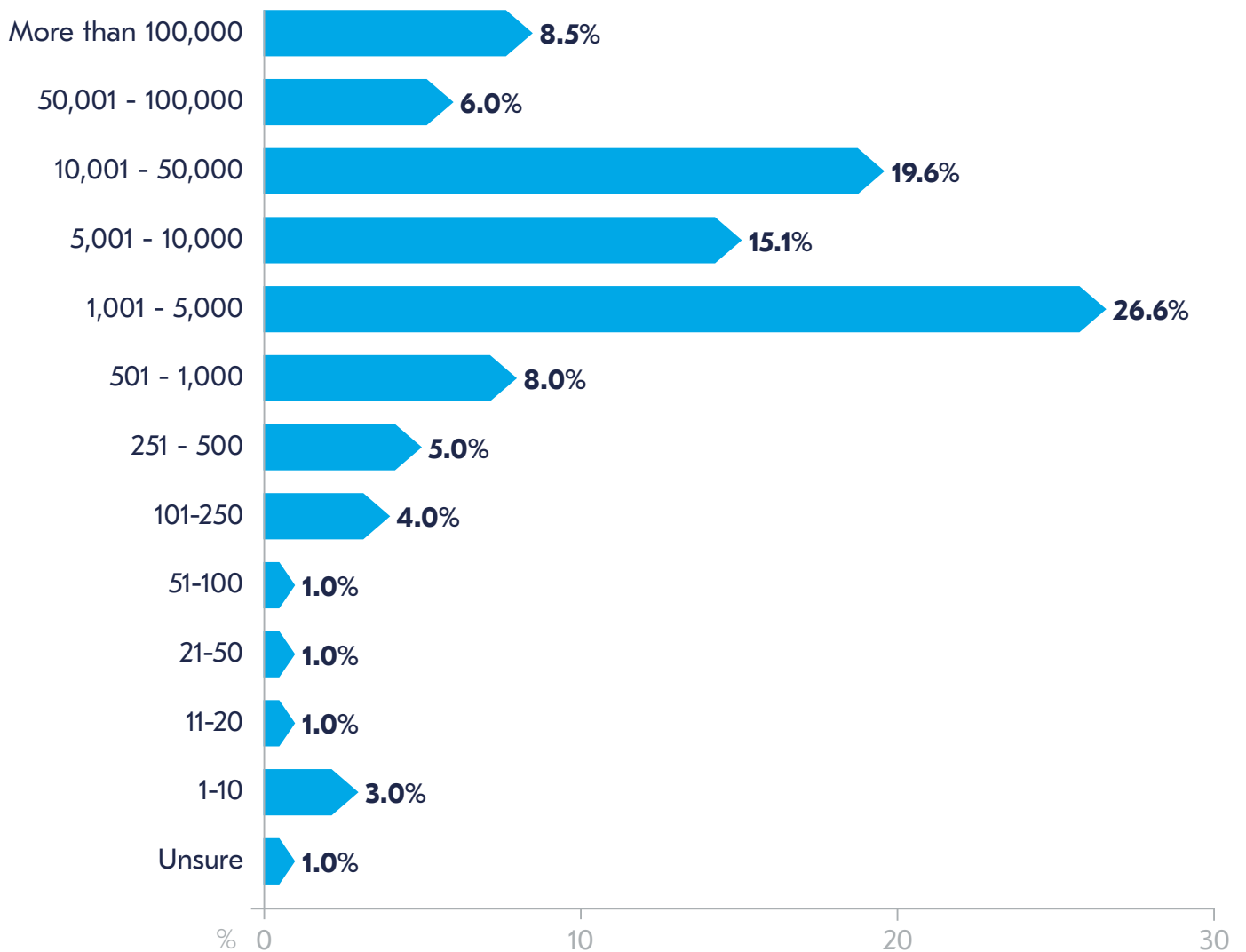


Figure 27. Approximately how many employees are there in your organization globally?

What is the approximate global annual turnover of your organization?

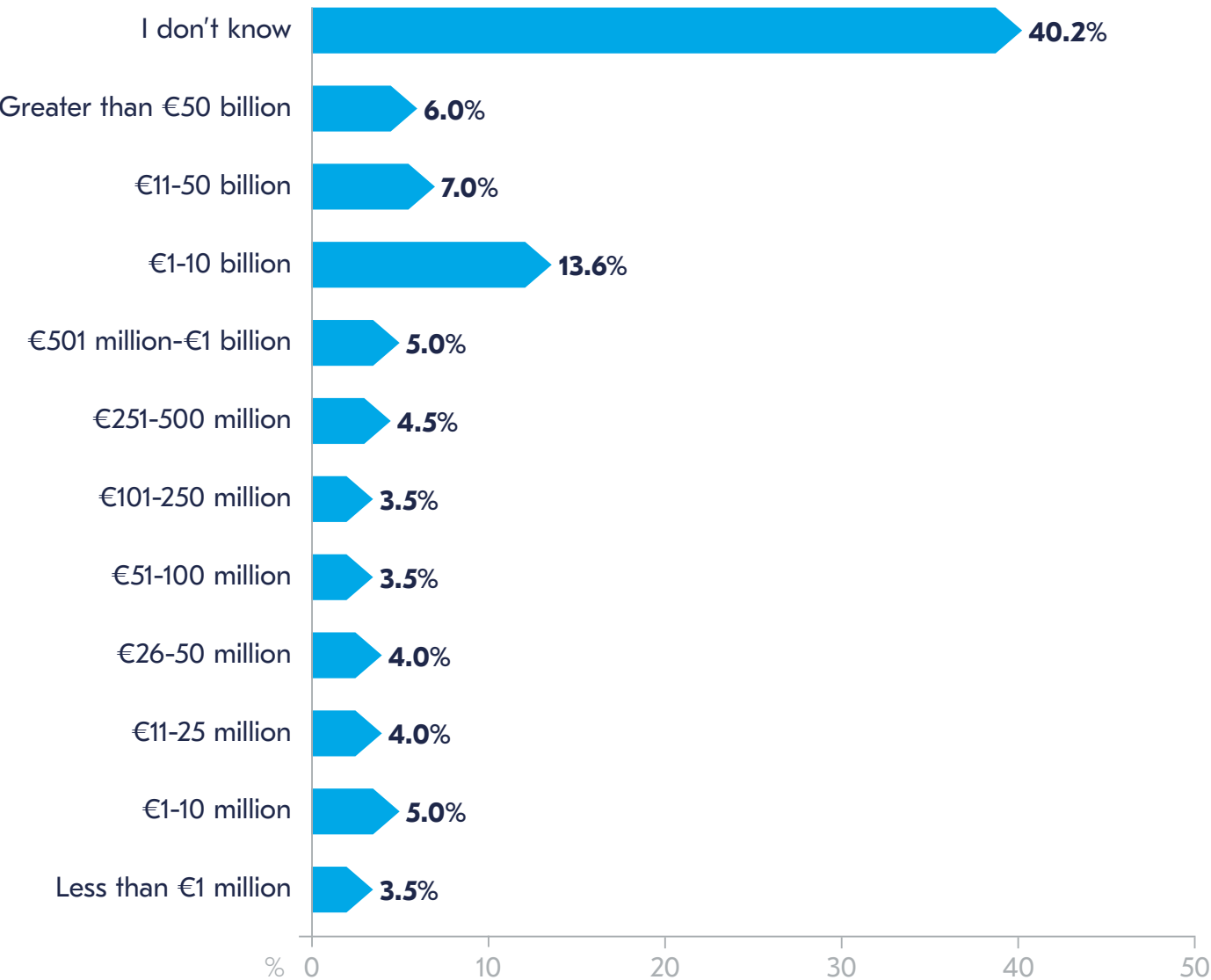


Figure 28. What is the approximate global annual turnover of your organization?

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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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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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About Riskconnect

Riskconnect is the leading integrated risk management software solution provider. Our technology empowers organizations with the ability to anticipate, manage, and respond in real-time to strategic and operational risks across the extended enterprise.

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Riskconnect's integrated risk management platform includes:

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- Claims Administration
- Third-Party Risk Management
- Enterprise Risk Management
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- Compliance
- Policy Management
- Project Risk
- Business Continuity & Resilience
- Health & Safety
- Healthcare

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