Accuracy is one of the most critical in communication

DIGITISATION

DIGITALISATION

DIGITAL TRANSFORMATION

DIGITISATION refers to creating a digital representation of physical objects or attributes

DIGITALIZATION refers to enabling or improving processes by leveraging digital technologies and digitized data

DIGITAL TRANSFORMATION is really <u>business transformation</u> enabled by digitalization

"DIGITAL SHOULD BE SEEN LESS AS A THING AND MORE OF **A WAY OF DOING THINGS**"

The point of digital transformation is not to become digital. It is about how we generate value for the business.

INNOVATION?

Something new, such as an invention, or the practice of developing and introducing new things.

An innovation is often a new product, but it can also be a **new way of doing something** or even a **new way of thinking**.

COVID-19 has created an <u>urgent need</u> for us to accelerate our digitalisation efforts.

Before the pandemic, digitalisation moved at a steady pace.

o Leaders wanted more proof of success.
o They didn't feel great urgency.
o Organizational culture seemed resistant.
o Capabilities and talent were thought to be lacking.

When the pandemic struck, things moved fast.

- Many employees started to work remotely.

- Enterprises ramped up digital engagement with customers.

- Cost structures were often reduced.

- Digital products and services thrived; most analog businesses suffered.

The COVID-19 crisis has accelerated the digitization of customer interactions by several years.

Average share of customer interactions that are digital, %

■ Precrisis   ■ COVID-19 crisis

Global
Adoption acceleration[1]
3 years

- June 2017: 20
- May 2018: 20
- Dec. 2019: 36
- July 2020: 58

Asia–Pacific
Adoption acceleration
4 years

- 22
- 19
- 32
- 53

Europe
Adoption acceleration
3 years

- 18
- 19
- 32
- 55

North America
Adoption acceleration
3 years

- 25
- 25
- 41
- 65

[1]Years ahead of the average rate of adoption from 2017 to 2019.

Source: McKinsey & Company
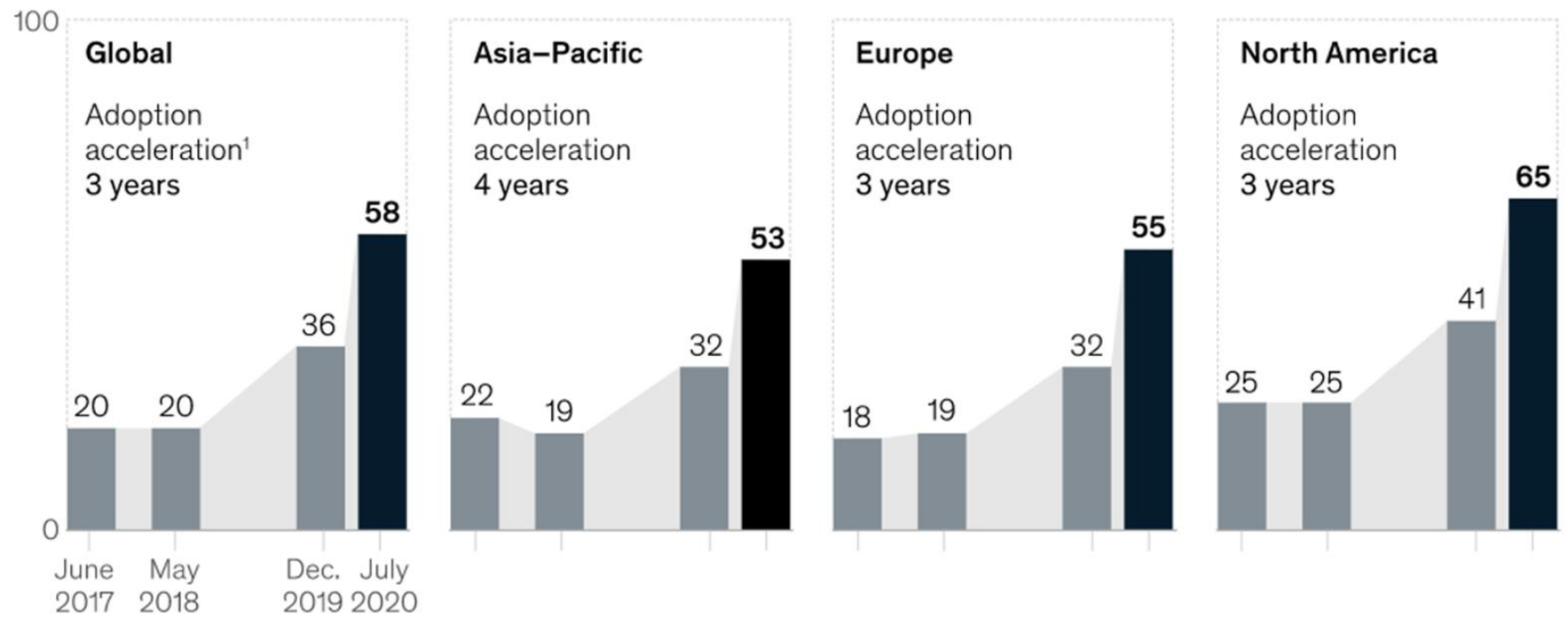
Across business areas, the largest leap in digitization is the share of offerings that are digital in nature.

Average share of products and/or services that are partially or fully digitized, %

Precrisis COVID-19 crisis

Global
Adoption acceleration[1]
7 years
- 29 (June 2017)
- 28 (May 2018)
- 35 (Dec. 2019)
- 55 (July 2020)

Asia–Pacific
Adoption acceleration
10+ years
- 31
- 26
- 33
- 54

Europe
Adoption acceleration
7 years
- 26
- 25
- 34
- 50

North America
Adoption acceleration
6 years
- 33
- 34
- 41
- 60

June 2017 May 2018 Dec. 2019 July 2020

[1]Years ahead of the average rate of adoption from 2017 to 2019.

Source: McKinsey & Company
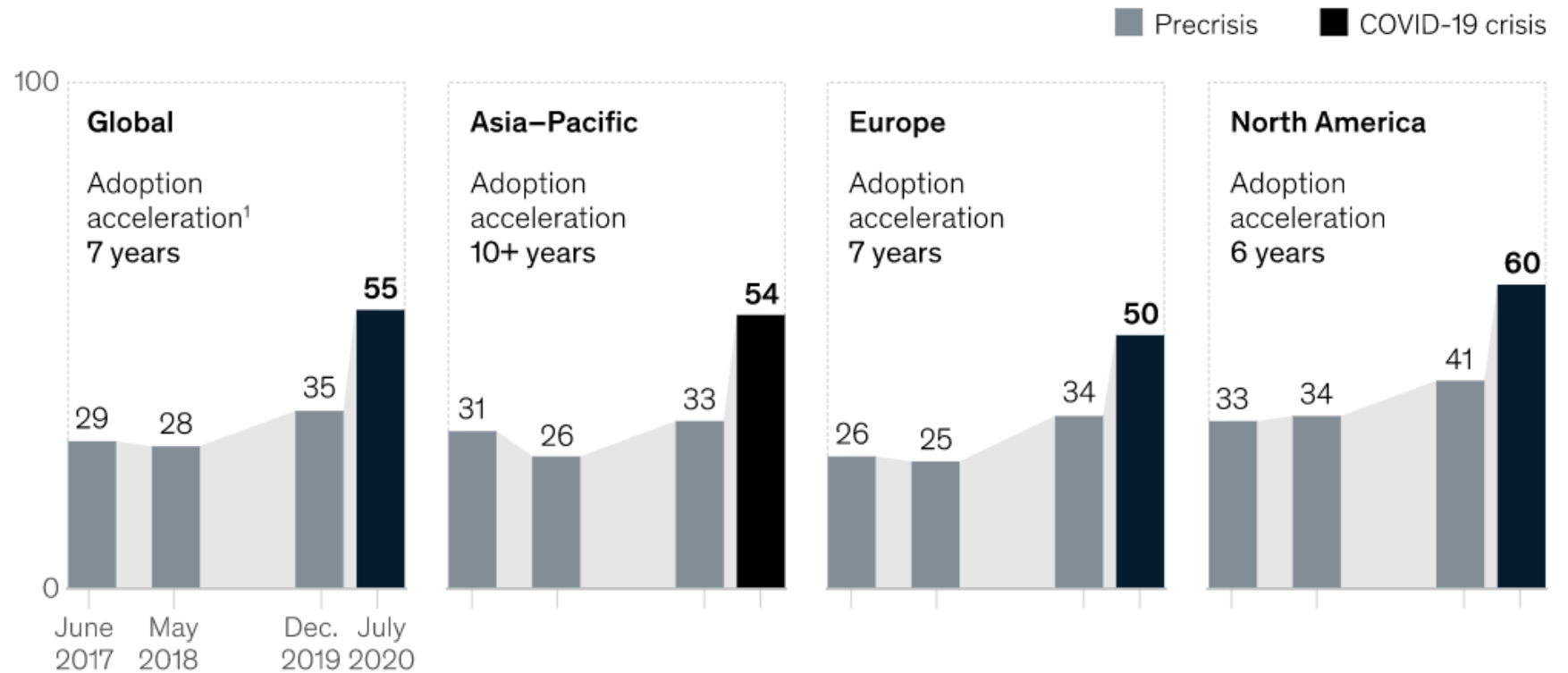
Common Themes of Recovery Plans Across the World

| Sustainability and Green Energy	Transportation and Mobility	Competitive Economy	Digitalization and Innovation
• Supply Chain Self-Sufficiency • Waste Reduction • Solar • Net-Zero Building • Green Manufacturing	• Mass Transit Infrastructure • Green Buses/Vehicles • Intelligent Transportation • Smart People Movement	• Manufacturing • Technology • STEM Investment • Innovation Funding • Business Revitalization • Education • Healthcare	• Innovation Hubs/ Centers • Research Investment • Digital Government • Public-Private Partnerships • Healthcare Systems

Digital Infrastructure, Broadband, 5G, Connectivity, Digital Equity

When the **WHY** is clear, the **HOW** becomes easy

Implementation of Digital Transformation

Decipher the Ambition

Incubate and Ramp Up the Operation

Digital Transformation

Structure the Transformation

Execute and Control the Implementation

Co-Create the Roadmap

Source: Gartner

Decipher the ambition
Structure the transformation
Co-create the roadmap
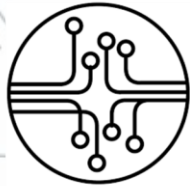**Execute and control** the implementation
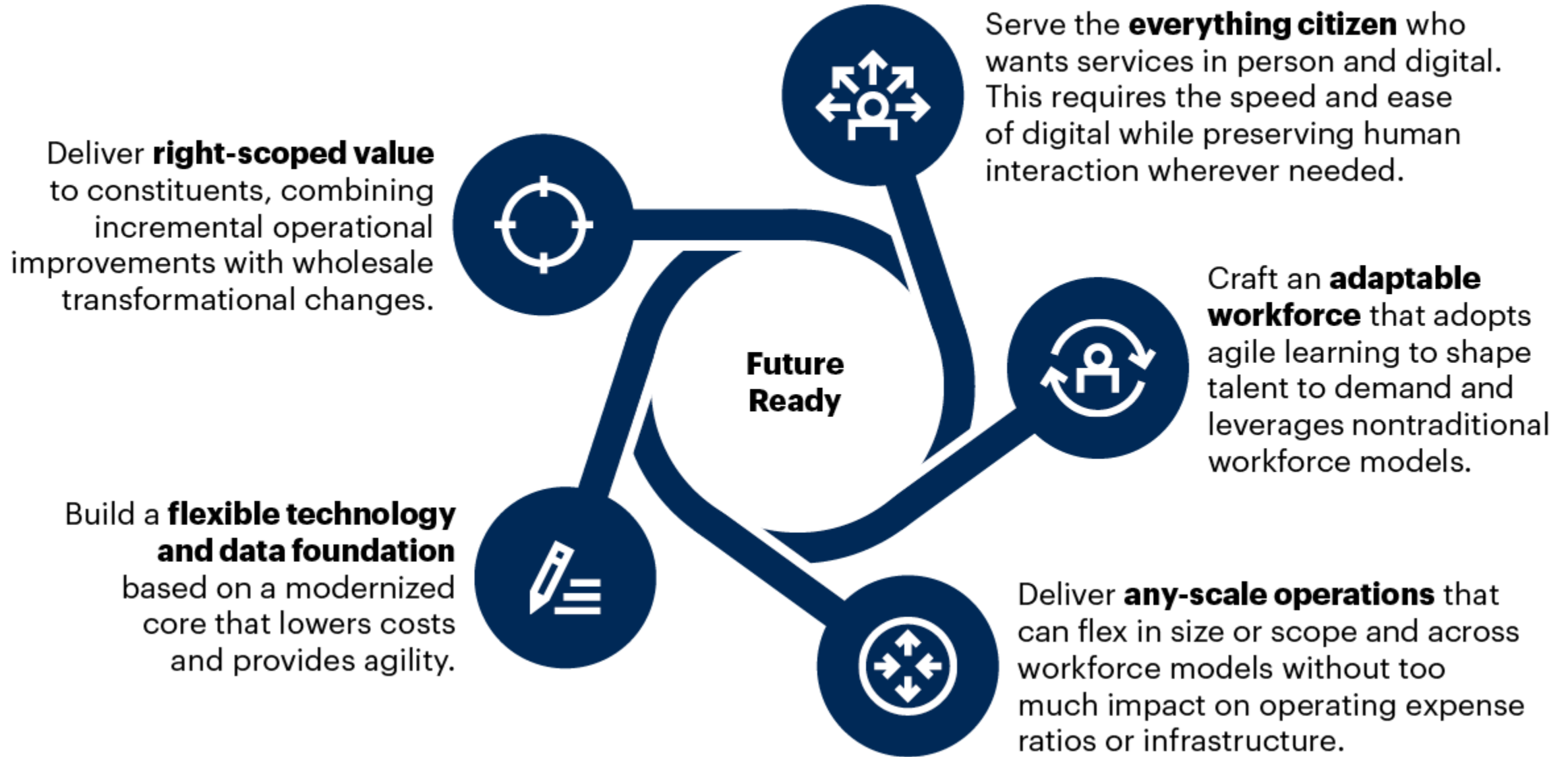**Incubate and ramp up**
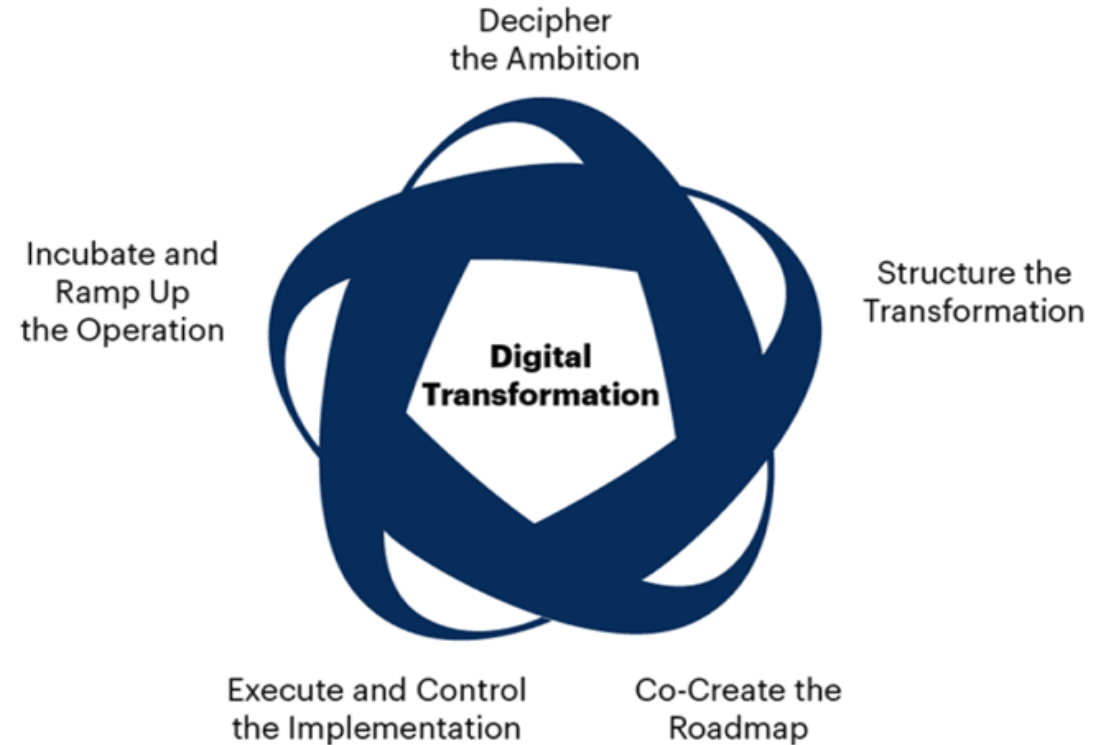
PEOPLE

PROCESS

TECHNOLOGY

When digital transformation is done right, it's like a caterpillar turning into a butterfly but when done wrong, all you have is a really fast caterpillar

- George Westerman, MIT Sloan Initiative on Digital Economy

Aiming to Build a Future-Ready Public Sector Organization Over Time

Future Ready

Deliver **right-scoped value** to constituents, combining incremental operational improvements with wholesale transformational changes.

Serve the **everything citizen** who wants services in person and digital. This requires the speed and ease of digital while preserving human interaction wherever needed.

Craft an **adaptable workforce** that adopts agile learning to shape talent to demand and leverages nontraditional workforce models.

Build a **flexible technology and data foundation** based on a modernized core that lowers costs and provides agility.

Deliver **any-scale operations** that can flex in size or scope and across workforce models without too much impact on operating expense ratios or infrastructure.

Source: Gartner

Digital is here to stay

**Fit for purpose,
Future Proof
and Holistic**

VALUE

**End Game is not about us, it is about what we value
we bring to our stakeholders**

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