OVERVIEW - BELGIUM

Top driver
Citizen demands

Top 3 barriers
1. Insufficient funding
2. Too many competing priorities
3. Lack of an overall strategy

Insights

• Only about 27 percent of organizations have increased investments in their digital initiatives over the last fiscal year, much less than the global average of 44 percent

• Satisfaction with the community of vendors is extremely low

Maturity

<table>
<thead>
<tr>
<th></th>
<th>Early</th>
<th>Developing</th>
<th>Maturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global (n=1202)</td>
<td>26%</td>
<td>60%</td>
<td>13%</td>
</tr>
<tr>
<td>Belgium (n=22)</td>
<td>23%</td>
<td>55%</td>
<td>23%</td>
</tr>
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“...it's all about working together and sharing know-how. Because tomorrow's network economy cannot be entrapped in yesterday's structures.”
— Alexander De Croo, Minister for the Digital Agenda on ‘Digital Belgium’ action plan
REEDINESS AND RESPONSE

<table>
<thead>
<tr>
<th>Have a clear and coherent digital strategy?</th>
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<tbody>
<tr>
<td>Global</td>
</tr>
<tr>
<td>46%</td>
</tr>
<tr>
<td>Belgium</td>
</tr>
<tr>
<td>55%</td>
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</table>

Objectives of digital strategy | % agree
--- | ---
1. Increase efficiency | 90%
2. Improve customer/citizen experience and engagement, and transparency | 90%
3. Create or access valuable information or insights to improve decision making | 70%
4. Fundamentally transform our organization processes and/or organization model | 55%
5. Create or access valuable information or insights for innovation | 50%

65 percent say that digital trends are improving their organization’s ability to respond to threats and opportunities
52 percent say their digital capabilities are behind the private sector

65% view digital technologies as an opportunity,
44% increased investment in digital initiatives in the last fiscal year.

36% satisfied globally,
37% confident globally.

Confident about organization’s readiness to respond to digital trends

- 24%
- 38%
- 24%

Satisfied with organization’s current reaction to digital trends

- 4%
- 31%
- 24%

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Don’t know</th>
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<tbody>
<tr>
<td>82%</td>
<td>37%</td>
<td>41%</td>
<td>4%</td>
</tr>
<tr>
<td>44%</td>
<td>36%</td>
<td>52%</td>
<td>1%</td>
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</table>

Global

Belgium
90% find workforce and skills to be a challenging area to manage in their organization’s transition to digital

55% say that leadership understands digital trends and technologies

34% say that their leaders have sufficient skills to lead the organization’s digital strategy

Does a single person or group have the responsibility to oversee/manage your organization’s digital strategy?

Belgium: Yes, 55%
Global: Yes, 51%

Digital skills vs investment in workforce:
- Employees have sufficient skills to execute organization’s digital strategy
- Organization provides opportunities and resources to obtain the right skills

Workforce-skills lacking:
- Agility: Belgium 68%, Global 59%
- Entrepreneurial spirit: Belgium 55%, Global 53%
- Business acumen: Belgium 42%, Global 40%
- Collaborative processes: Belgium 41%, Global 40%
- Technological savviness: Belgium 36%, Global 39%
- User experience design: Belgium 36%, Global 39%
86% say that digital technologies and capabilities enable employees at their organization to work better with customers/citizens

90% say improving customer/citizen experience and transparency is an objective of their organization’s digital strategy

How are digital trends impacting your organization’s customer/citizen service quality?

Belgium: Improving, 90%
Global: Improving, 78%

What is the biggest driver of digital transformation?

Global:
- Customer/citizen demands: 37%
- Cost and budget pressures: 14%
- Federal/central government directives: 11%
- Others: 20%

Belgium:
- Customer/citizen demands: 40%
- Cost and budget pressures: 15%
- Federal/central government directives: 35%
- Others: 10%

What is the level of customer/citizen involvement in co-creating digital services for your organization?

Belgium:
- Low: 11%
- Neither high nor low: 53%
- High: 36%

Global:
- Low: 60%
- Neither high nor low: 20%
- High: 20%

Don’t know: 10%
65% find culture to be a challenging area to manage in their organization’s transition to digital

73% say that digital technologies and capabilities enable employees at their organization to work better with other employees

Digital trends are changing these dynamics within my organization:

- Collaborative culture: 20% Neither improving nor degrading, 80% Improving
- Innovative culture: 30% Neither improving nor degrading, 70% Improving

Is the transition to digital altering your organization’s attitude towards risk?

- Global:
  - 26% Don’t know
  - 46% No
  - 28% Improving

- Belgium:
  - 15% Don’t know
  - 59% No
  - 26% Improving

67% globally say digital trends improve collaborative culture
65% globally say digital trends improve innovative culture
80% find procurement to be a challenging area to manage in their organization’s transition to digital. 68% say that government procurement needs to change significantly or very significantly to accommodate digital transformation. 12% say that they are satisfied with the community of vendors that currently serves the digital government marketplace.

### Top 3 obstacles to better procurement practices in the digital age

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<tr>
<th>Obstacle</th>
<th>Belgium</th>
<th>Global</th>
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<tbody>
<tr>
<td>1. Rules/regulations</td>
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<tr>
<td>2. Lack of flexibility</td>
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<tr>
<td>3. Procurement skill sets</td>
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### In what ways does procurement need to change to enable digital transformation?

- Agile development process
- Less restrictive terms and conditions
- Modular development
- More open to small and medium-sized companies
- Less control from the center
- Shorter contract periods

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