DIGITAL GOVERNMENT TRANSFORMATION

Nordic Region Survey Data Analysis
Public Sector Research Group

October 2015

Deloitte.
Digital

OVERVIEW – NORDIC COUNTRIES

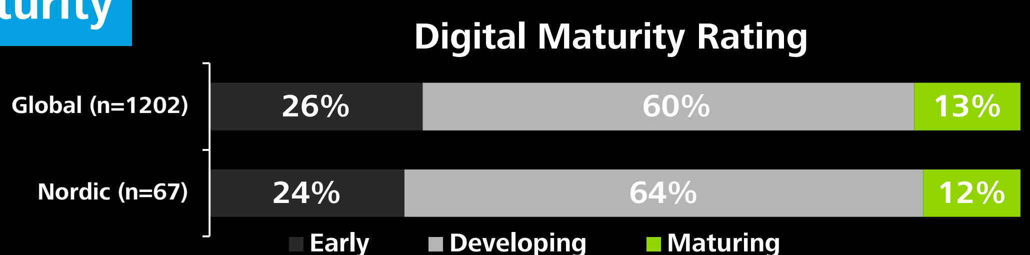
Top Digital driver
Citizen demands

Top 3 barriers
1. Security concerns
2. Too many competing priorities
3. Lack of understanding

Insights

- 95 percent of respondents find the transition to digital in terms of culture challenging—the highest globally
- In stark contrast to the global view, agencies in the Nordic Region at any level do not see insufficient funding as one of the primary impediments to digital transformation

Maturity



"On the one hand, there is a demand for more agility, fewer rules and less political regulation – and on the other hand, digitization is a highly political issue precisely because it concerns our entire way of running a society."

— Lars Frelle-Petersen , Director General, Danish Agency for Digitization

READINESS AND RESPONSE

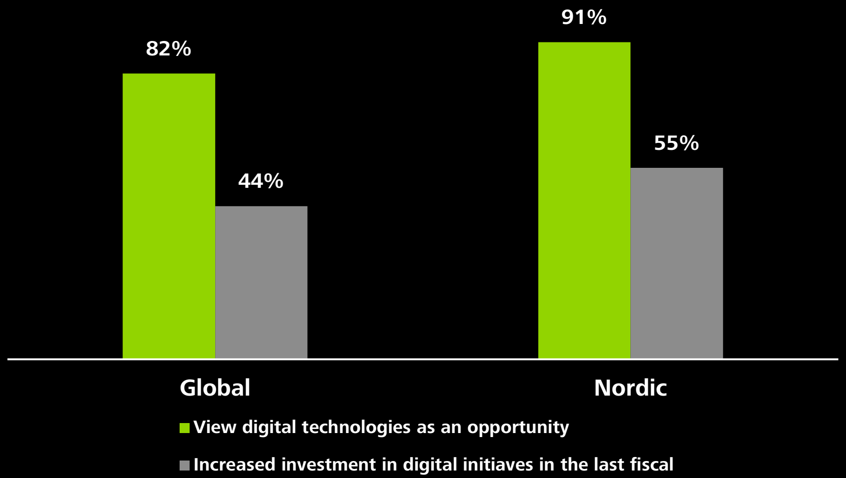
50 percent say that digital trends are improving their organization's ability to respond to threats and opportunities

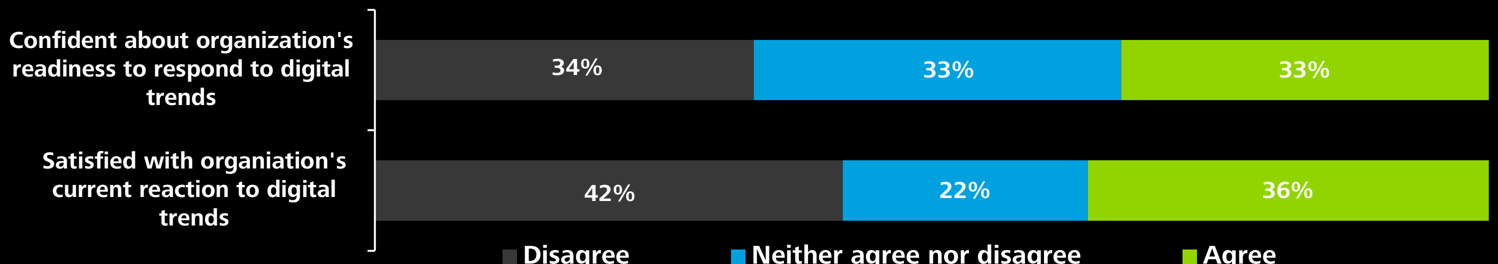
52 percent say their digital capabilities are behind the private sector

Have a clear and coherent digital strategy?	
Global	46%
Nordic	57%

Objectives of digital strategy	% agree
1. Increase efficiency	95%
2. Improve customer/citizen experience and engagement, and transparency	88%
2. Create or access valuable information or insights to improve decision making	74%
4. Create or access valuable information or insights for innovation	69%
5. Fundamentally transform our organization processes and/or organization model	59%

Digital opportunity vs investment





36% confident globally

37% satisfied globally

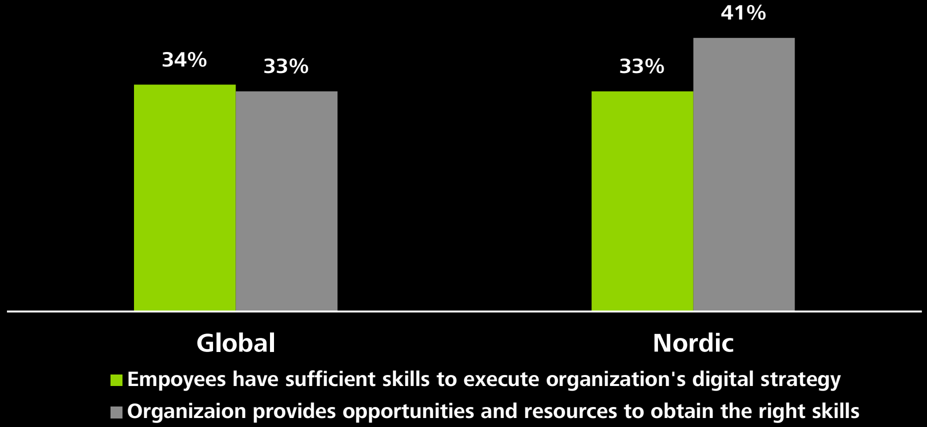
LEADERSHIP, WORKFORCE AND SKILLS

97% find workforce and skills to be a challenging area to manage in their organization's transition to digital

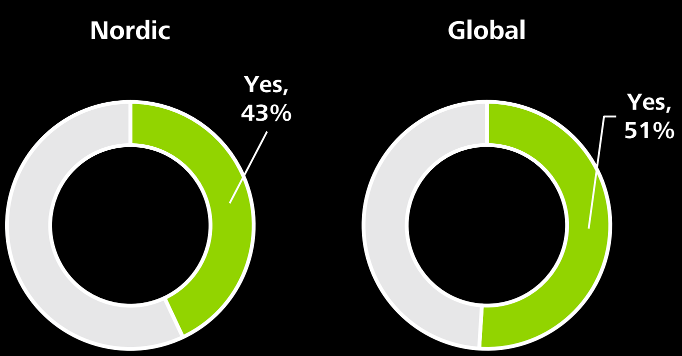
55% say that leadership understands digital trends and technologies

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

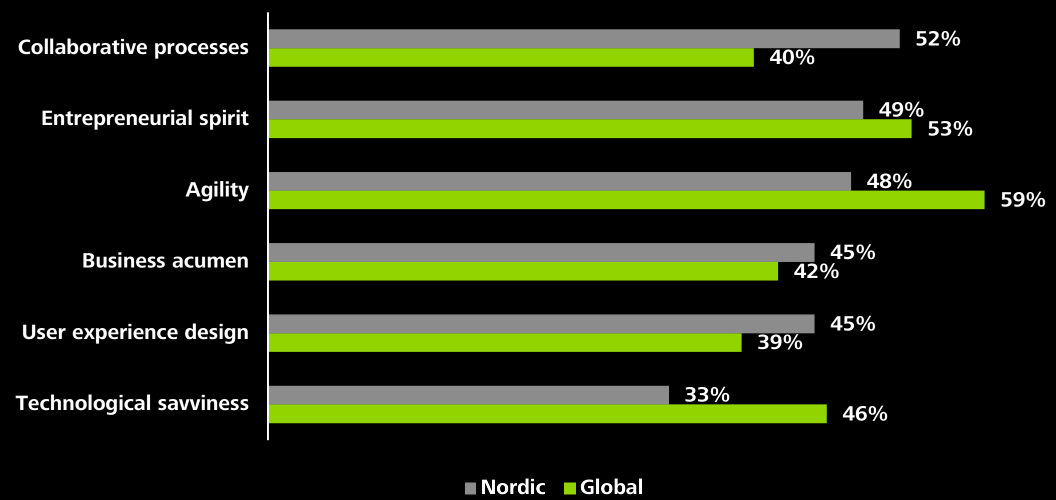
Digital skills vs investment in workforce



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



Workforce-skills lacking

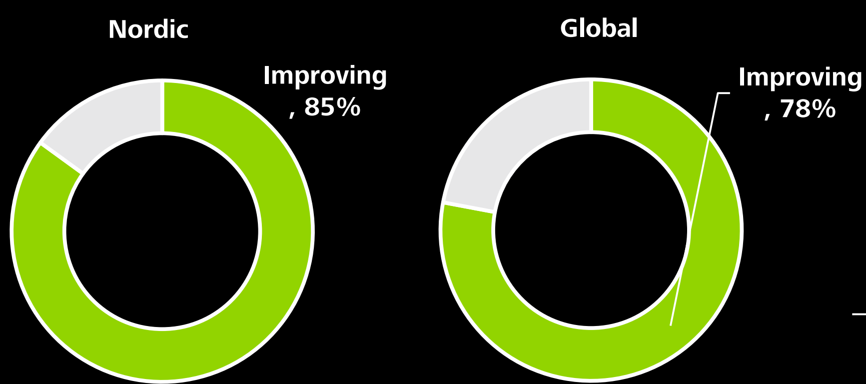


CUSTOMER/CITIZEN-FOCUS

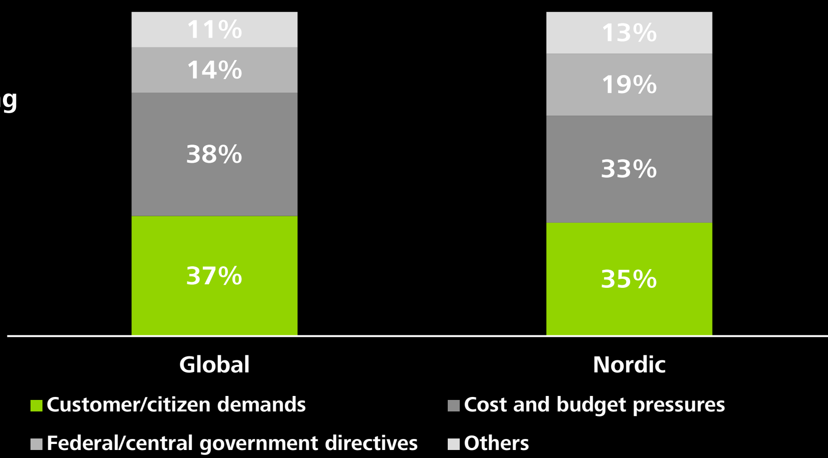
85% say that digital technologies and capabilities enable employees at their organization to work better with customers/citizens

88% say improving customer/citizen experience and transparency is an objective of their organization's digital strategy

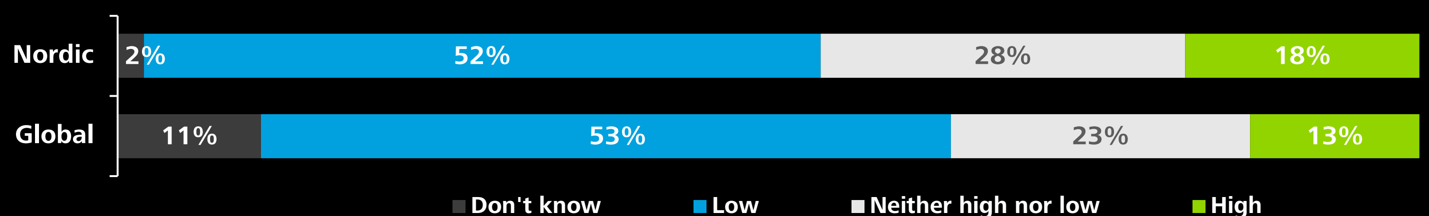
How are digital trends impacting your organization's customer/citizen service quality?



What is the biggest driver of digital transformation?



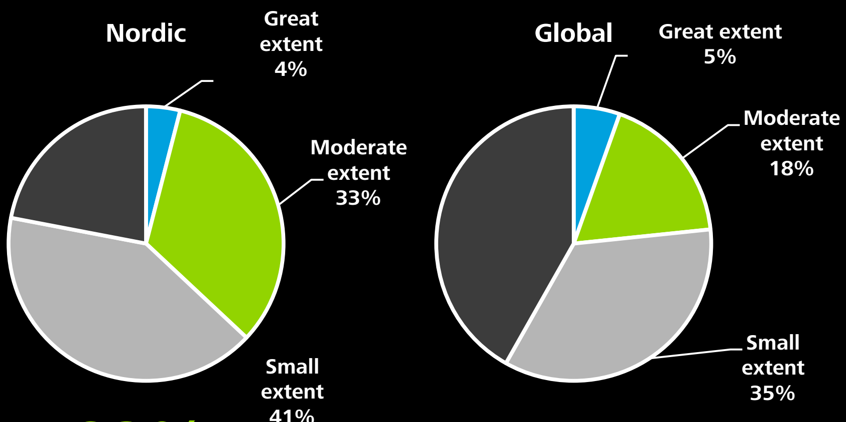
What is the level of customer/citizen involvement in co-creating digital services for your organization?



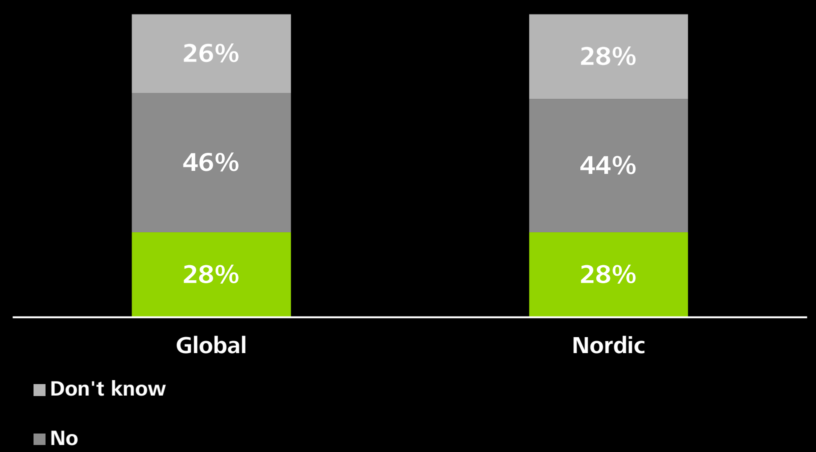
CULTURE - INNOVATION, COLLABORATION, OPEN SOURCE, AGILE

96% find culture to be a challenging area to manage in their organization's transition to digital

To what extent does your organization use open source technology to deliver digitally transformed services?

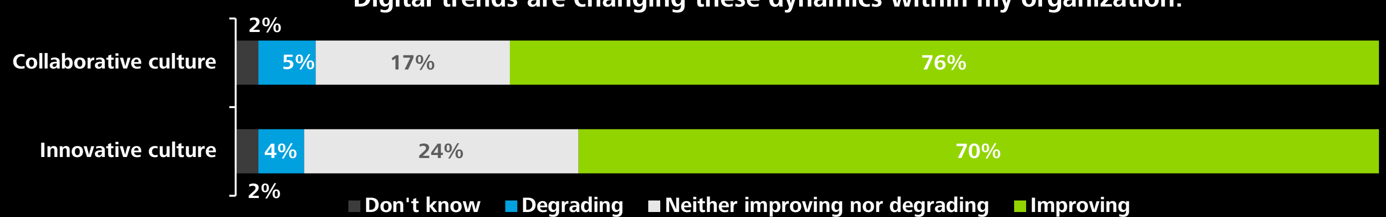


Is the transition to digital altering your organization's attitude towards risk?



82% 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:



67% globally say digital trends improve collaborative culture

65% globally say digital trends improve innovative culture

PROCUREMENT

85% find procurement to be a challenging area to manage in their organization's transition to digital

84% say that government procurement needs to change significantly or very significantly to accommodate digital transformation

33% 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	
Nordic	**Global**
1. Rules/regulations	1. Rules/regulations
2. Lack of flexibility	2. Lack of flexibility
3. Legacy contracts	3. Procurement skill sets