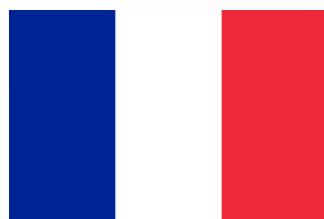


Global Digital Transformation Survey Report

FRANCE



Digital Transformation Delivering Business Outcomes

shaping tomorrow with you



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Introduction: France

This report contains analysis of the French data from the 2017 Fujitsu Global Digital Transformation Survey. The research was conducted to find out more about how business leaders are responding to digital transformation challenges, and to identify what initiatives they are undertaking in the area. We received 1,614 responses from business leaders across 15 countries, including 103 from France.

Digital technologies such as the Internet of Things (IoT) and Artificial Intelligence (AI) are being embedded into core value-generation processes in business and society, transforming people's work and daily lives and generating innovation. This is digital transformation. Business leaders around the world are becoming aware of the power of digital transformation, and taking action to realise its huge potential.

Today, digital technologies are moving into the heart of everything we do, changing the way businesses and people work, how they live and how they innovate. In the new digital society, digital transformation and digital co-creation become business norms. Digital co-creation means blending your business expertise and digital technology, and creating new value – together with ecosystem partners and customers – to shape a better future.

Digital transformation initiatives usually start from the testing phase, then a Proof of Concept (PoC) and a Proof of Business (PoB) phase, and then shift to the implementation phase. But new technology alone is not sufficient for digital transformation. New talents, and people who have different skills and innovative ways of doing things, are required. Leadership, agility and co-creation with partners are very important elements.

The theme of the Global Digital Transformation Survey is aligned with the story of Fujitsu Technology and Service Vision, which sets out our vision and insights into how business leaders can leverage digital transformation in business and society, enabling and creating a better future.

The Fujitsu Technology and Service Vision can be downloaded from the following link:
URL: <http://www.fujitsu.com/global/vision/>



Key findings

- Marketing and workstyle transformation are equally the top functional area for digital transformation in French organizations, with 40.8% of organizations reporting projects in that area. Logistics, finance and manufacturing are the major areas of digital transformation in specific functional areas.
- The most positive outcome of digital transformation is increased revenue with 51.9% of French respondents reporting this as the most positive outcome. Many organizations also report a stronger relationship with customers (40.3%) and strengthened competitiveness (40.3%).
- Key factors in delivering digital transformation are talented staff with the right skills (reported by 21.2% of respondents), and support from technology partners (17.3%). The biggest inhibitors are a fear of change or internal resistance (14.0%) and concern of cyber security risks (13.0%).
- Almost a third (30.1%) of French business leaders say it is important to have a strong technology partner to achieve digital transformation. The technology partners need to have strong technological capability (reported by 27.2% of respondents), and high levels of trust for collaboration (18.4%).
- Almost all respondents (82.5%) believe that artificial intelligence (AI) represents an opportunity, rather than a threat. Even more (83.5%) believe that AI will enhance people's capabilities in the future, but 55.3% believe that jobs may be displaced.
- French business leaders believe that a professional knowledge of digital technologies are the most important capabilities needed in the digital era (reported by 29.1% of respondents). But they also believe that logical and analytical capability (18.4%) and professional knowledge of specific industries (14.6%), indicating a strong perception that a balance of skills is needed to drive digital transformation.

What is the focus of digital transformation?

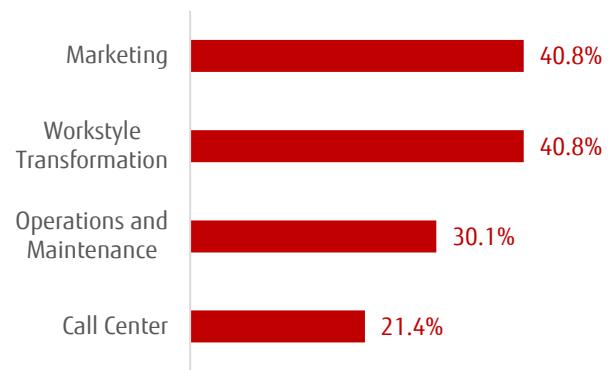
Digital transformation is undertaken in many functional areas. The survey asked French business leaders about the extent to which it has been implemented in four key business infrastructure areas common to most organizations, across all industry sectors. These are marketing, work style transformation, operations and maintenance, and call centers.

Of these functions, digital transformation is equally likely to take place in marketing and workstyle transformation – projects are underway or have been implemented in 40.8% of organizations in France. Operations and maintenance (30.1%) and call centers (21.4%) are also areas in which a significant amount of digital transformation is taking place (note the numbers add up to more than 100% because respondents could include up to three functional areas).

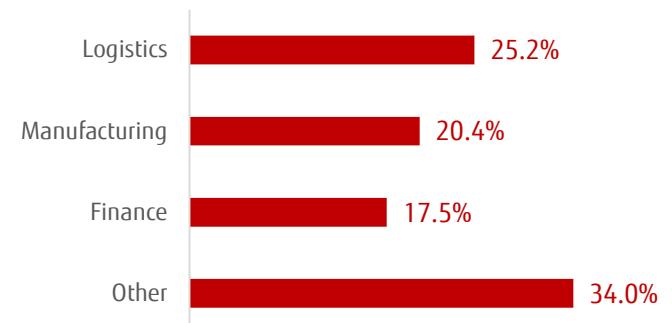
The survey also asked about the status of digital transformation in a range of specific functional areas: logistics, finance, manufacturing. These need not be undertaken in these industries – e.g., a finance digital transformation project could take place in most industry sectors.

A quarter (25.2%) of all respondents have implemented or are implementing digital transformation process in logistics, followed by manufacturing (20.4%) and finance (17.5%). More than a third (34.0%) have implemented other digital transformation projects, in a range of functional market areas.

What is the functional focus of your digital transformation? (cross-functional)



What is the functional focus of your digital transformation? (specific function)



How advanced are organisations on their digital journey?

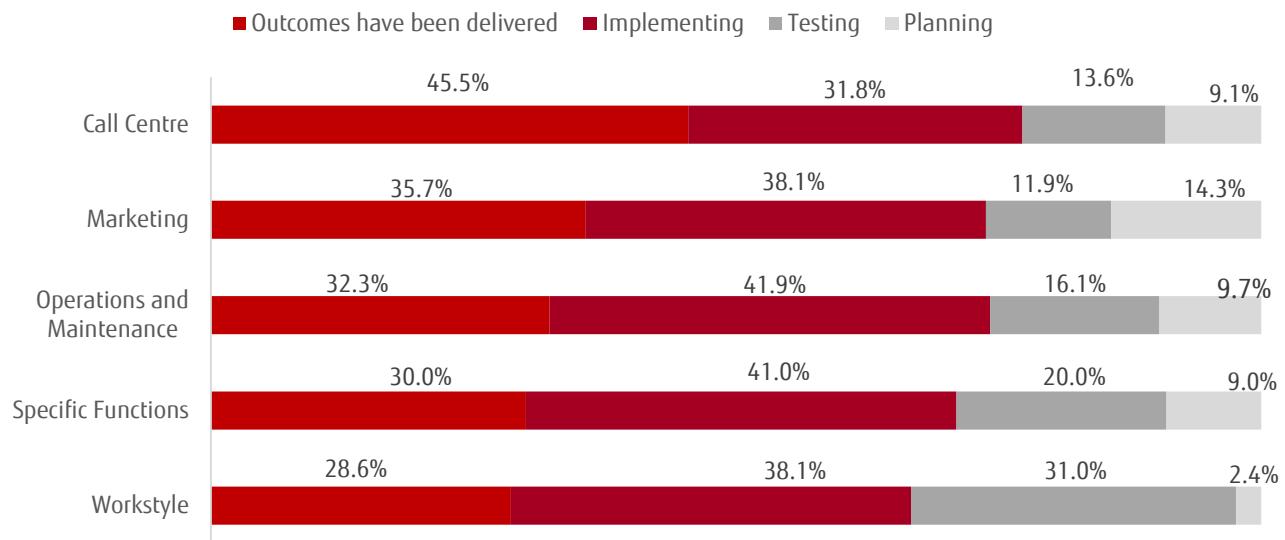
The highest level of delivered digital transformation outcomes in France is in call center (45.5%), followed by marketing (35.7%), operations and maintenance (32.3%) and specific functional applications (30.0%).

Workstyle transformations are the least likely to have delivered outcomes (28.6%) but also the least likely to be in the planning phase (2.4%) and the most likely to be in testing (31.0%) phase.

(Note that this chart aggregates the specific functional areas on the previous chart).

The results indicate that digital transformation are somewhat advanced amongst French organizations. The great majority of projects are in the process of being implemented or have delivered on their outcomes, with relatively few in the planning or testing phase.

Which best describes the progress of the digital transformation?



What are the benefits of digital transformation? (France vs global)

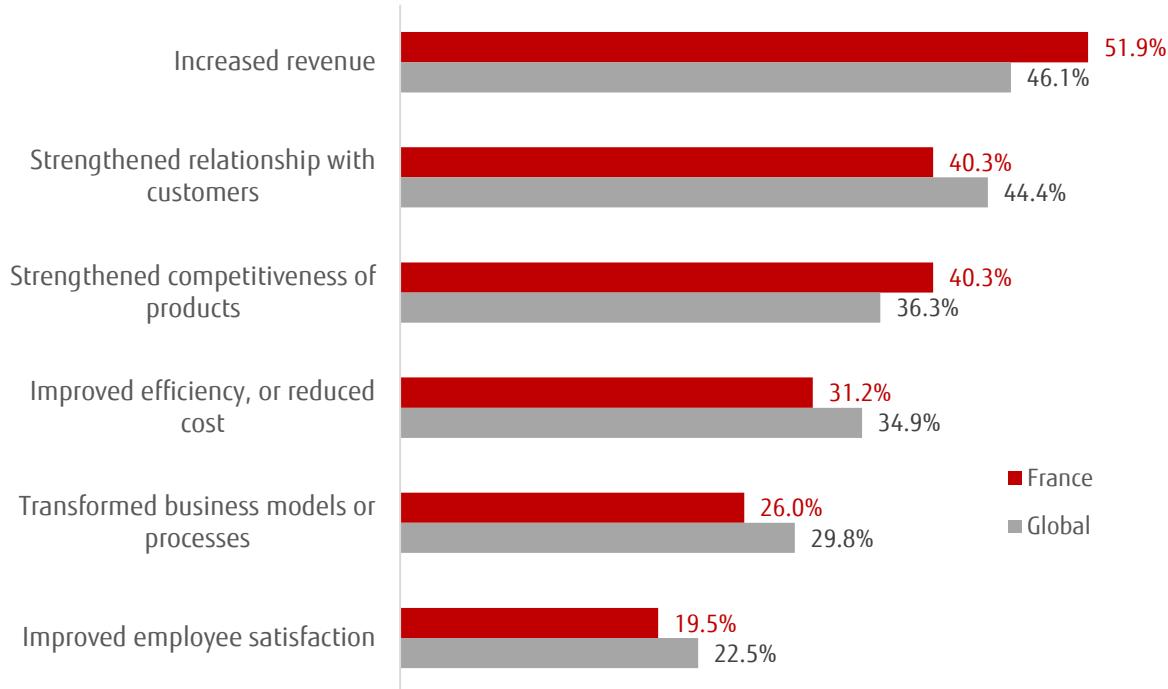
The survey asked French business leaders what kind of outcomes have been delivered through their digital transformation projects. More than half (51.9%) say that the greatest benefit of digital transformation has been increased revenue.

An equal number of respondents (40.3%) say it has strengthened relationship with customers and competitiveness of products, improved efficiency, or reduced cost (31.2%), transformed business models or processes (26.0%) and improved employee satisfaction (19.5%).

A comparison of the French results with those from the full global survey shows that the results are similar. France delivers increased revenue as an outcome more than the global average (51.9% vs 46.1%). This also the case with strengthened competitiveness of products (40.3% vs 36.3%). Conversely, strengthened relationships with customers (40.3% vs 44.4%) and improved efficiency (31.2% vs 34.9%) are less significant in France than globally.

The results indicate the many benefits of digital transformation. The effects are felt across the organization, not just on the bottom line.

Which outcomes has digital transformation delivered to your organisation? (France vs global)



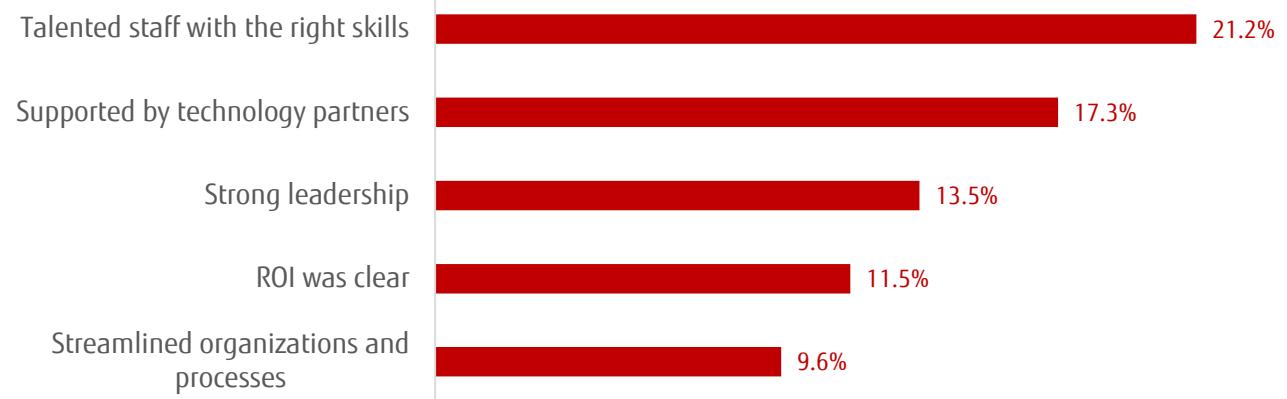
What are the key success factors and inhibitors in digital transformation?

Digital transformation is not just about introducing new technologies. In order to deliver successful outcomes, organizations need talented staff with the right skills, and to create a culture of transformation.

The survey asked French business leaders what they believed to be the key factors for successful digital transformation. At the top of the list is having talented staff with the right skills, mentioned by 21.2% of respondents. Next came support by technology partners (17.3%), strong leadership (13.5%), clear ROI (11.5%) and streamlined organizations and processes (9.6%).

The survey also asked about which factors hindered digital transformation. The most often mentioned was a fear of change or internal resistance (14.0%), Other inhibitors were a concern of cyber security risks (13.0%), no technology partners (11.0%), lack of agility in the organization (10.0%), a lack of leadership (10.0%) and a lack of talented staff with the right skills (10.0%).

Which factors were key in delivering digital transformation outcomes?



Which factors hindered the progress of digital transformation?



What are the key success factors in digital transformations? (France vs global)

The chart compares the key success factors from the previous chart, for France vs the overall global findings.

There are many differences between France and the rest of the world. An important difference is that support from technology partners is of greater importance in France, mentioned by 17.3% of respondents vs 7.3% globally. This is also the case with having a clear ROI (11.5% vs 5.4%).

Globally, strong leadership is a more important factor (13.5% vs 17.5%) as is streamlined organizations and processes (9.6% vs 16.5%).

Which factors were key in delivering digital transformation outcomes? (France vs global)



How important is a strong technology partner for digital transformation?

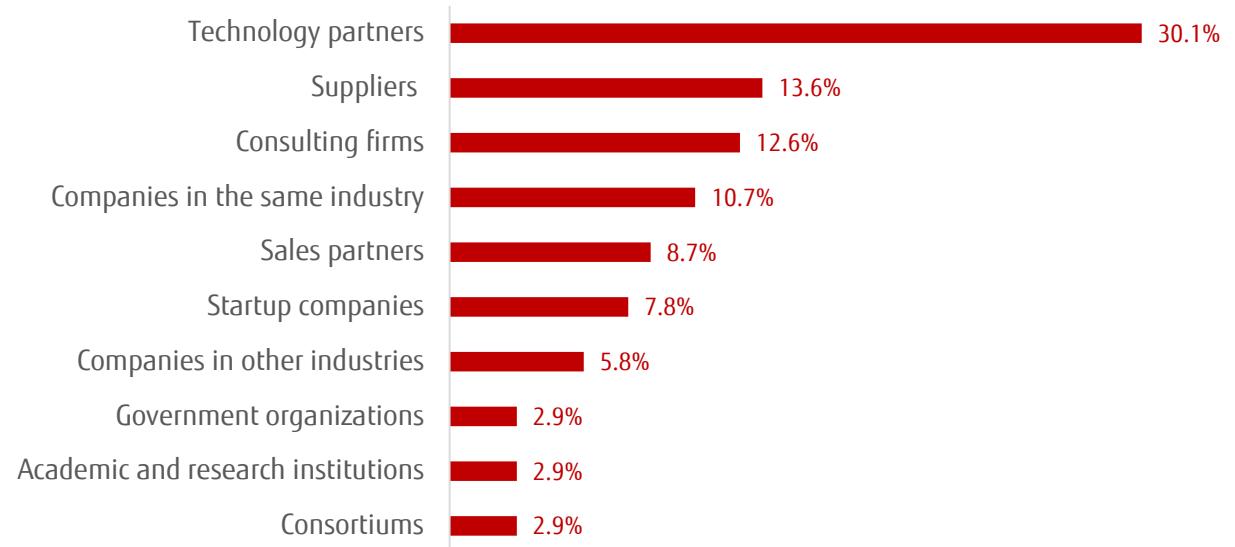
Success in digital transformation requires cooperation with external technology partners. Business leaders in France were asked which types of partners were most important.

Most highly rated were technology partners, ranked as most important by 30.1% of respondents. Other important partners were suppliers (13.6%), consulting firms (12.6%), companies in the same industry (10.7%).

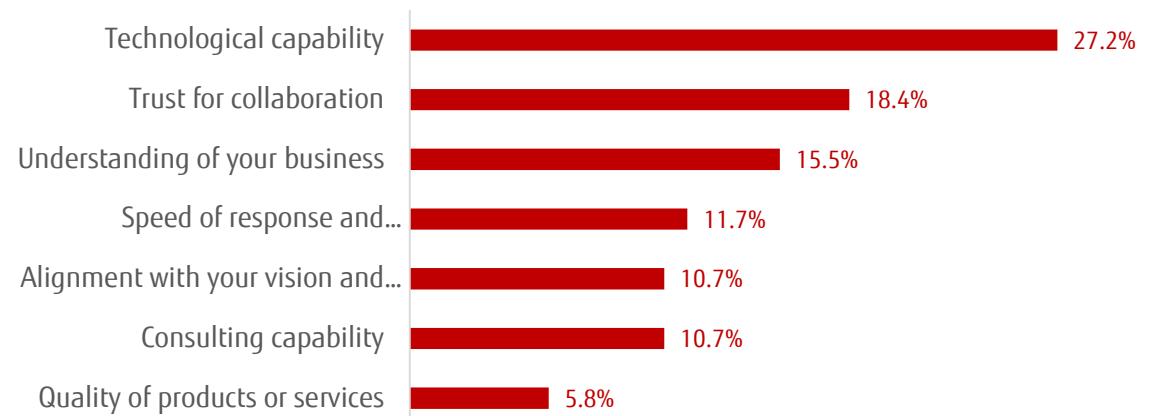
Respondents were also asked about what they expect from a technology partner. The most important attribute is technological capability, mentioned by 27.2% of respondents.

Other important attributes were trust for collaboration (18.4%), and an understanding of the organization's business (15.5%).

Which partners are important to collaborate with for digital transformation?



What do you expect from a technology partner for digital transformation?



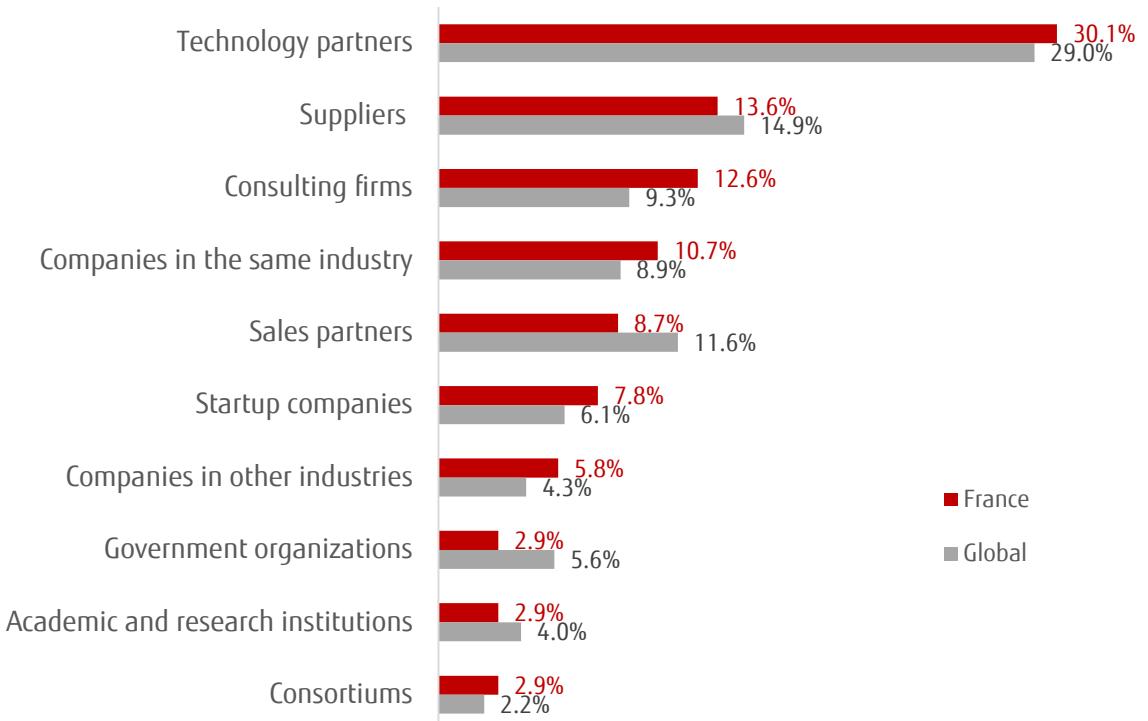
Which partners are important? (France vs global)

The chart compares the importance of technology partners from the previous chart, for France vs the overall global findings

Technology partners are almost equally important in France as they are globally (mentioned by 30.1% of French respondents and 29.0% globally).

Suppliers (13.6% vs 14.9%) and sales partners (8.7% vs 11.6%) were mentioned by fewer French respondents, while companies in the same industry (10.7% vs 8.9%) and start-ups (7.6%vs 6.1%) were more important in France.

Which partners are important to collaborate with for digital transformation? (France vs global)



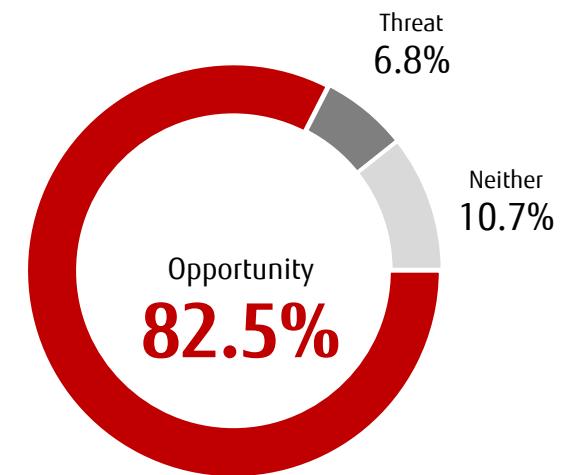
What is the potential of Artificial Intelligence?

The survey asked French business leaders three questions about perceptions of artificial intelligence (AI).

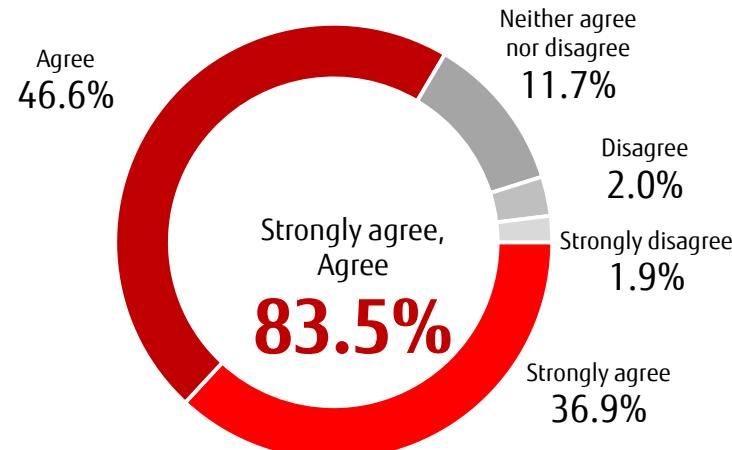
Of the respondents surveyed, 82.5% see AI as an opportunity, with just 6.8% seeing it as a threat. But there is some ambivalence about its effects.

Most survey respondents strongly agree (36.9%) or agree (46.6%) that AI will enhance people's capabilities in future, but they also believe that AI will be used for work currently performed by people (20.4% strongly agree, 30.5% agree).

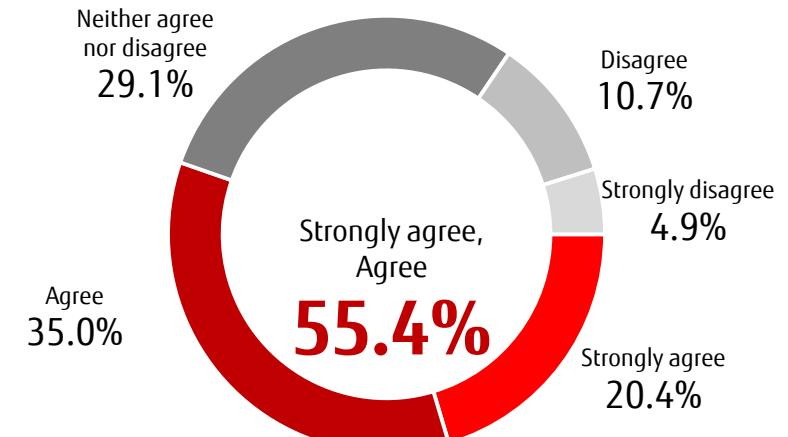
Is AI an opportunity or a threat?



Will AI enhance people's capabilities in the future?



Will AI substitute for people's work in the future?



What are the key skills and capabilities required in the digital era? (France vs global)

Business leaders in France believe that a professional knowledge of digital technologies is the most important capability needed in the digital era (29.1% of responses).

Other important capabilities are logical and analytical capability (18.4%) professional knowledge of specific industries (14.6%), professional knowledge of specific business function (12.6%). Also mentioned were creativity and imagination (10.7%) and liberal arts (5.8%).

In France, a professional knowledge of digital technologies is more highly regarded than globally (29.1% vs 18.3%) This is also the case with logical and analytical capability (18.4% vs 10.1%). Creativity and imagination (10.7% vs 17.1%) and the liberal arts (5.8% vs 8.1%) are regarded as less important in France than globally.

The range of capabilities mentioned indicates that there is a strong perception that a balance of skills is required to drive digital transformation – it is not just about technical capabilities.

What are the most important capabilities people need in the digital era? (France vs global)



About the survey

Survey topics:

- Current awareness of digital transformation: Fields, progress, outcomes, factors behind success, issues
- Co-creation in digital businesses: Required partners, elements required of technology partners
- AI (artificial intelligence) awareness: Perspective on AI, skills required during the digital era

Survey method:

- Online

Fieldwork period:

- February 2017

Survey respondents:

- Company size: Medium and large (at least 100 employees and sales of at least USD 1 million during the previous FY)
- Respondents: Management (CEOs, CMOs, CFOs, CIOs, CDOs, CSOs) and decision-makers equivalent to management

Surveyed countries:

The reports surveyed 1,614 business leaders in 15 countries, including 103 from France. Other countries surveyed for the global report were:

- Americas: Canada (56), USA (258)
- Europe: Finland (56), Germany (103), Spain (103), Sweden (52), United Kingdom (103)
- Asia: China (103), Indonesia (52), Japan (309), Republic of Korea (55), Singapore (103), Thailand (52)
- Oceania: Australia (106)

Download the France and Global report at: <http://www.fujitsu.com/global/microsite/vision/insightful-stories/survey1/>

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