

## Press release

Paris, France, 7 February 2023

### Digital Flow Observatory survey, 3<sup>e</sup> edition:

- **High expectations from employees in terms of cybersecurity**
- **Managers expect new technologies to be a lever for collective performance**
- **Both managers and employees expect that green digital solutions will further the positive impact of technology**
- **Attractive jobs that are accessible to women too**

The summary of the 2022 edition of the Digital Flow Observatory survey has just been published. For the past three years, this annual barometer carried out in collaboration with the CSA Institute reports on the evolution of issues related to digitalization in companies, comparing the views of employees with those of managers. Amidst environmental pressure and economic instability, and with digital needs and uses that change continuously, Inetum, the leader in digital services and solutions in Europe, confirms its role to identify, understand and better respond to the current and future expectations of organizations.

Digital transition is increasingly identified as a real driver of environmental and sustainable transition according to Inetum's survey on digital flow that was conducted by the CSA Institute in late 2022. The reasons for implementing digitalization plans within companies seem unavoidable, and without distinction between types of structure. As far as the development of digital tools is concerned, new priorities are emerging, focused on meeting customers' needs, with very strong priorities among medium-sized companies.

#### ***Summary of the results of the 2022 Digital Flow Observatory survey:***

#### **A complementary perception and a consensus on the challenges of corporate digitalization for managers and employees.**

- **1 out of 2 employees believe that their company is ahead in terms of digitalization, whereas 7 out of 10 company executives believe that they are ahead in this field.**
- **There is a strong consensus on the benefits of digital solutions, with tools that enable 62% of all companies and 82% of companies with more than 250 employees (medium-sized and large companies) to better meet their customers' needs. This is even the first benefit that employees expect (72%, i.e. up with 5 points).**
- **1 out of 3 managers are considering limiting or postponing their investments in digitalization in the current geopolitical and economic context.**
- **92% of employees think that companies must above all strengthen the security of their information systems in the current geopolitical and economic climate.**
- **37% of employees clearly want to see the development of energy-saving solutions.**
- **1 woman out of 2 thinks that digital jobs are accessible to them.**

## **Digitization is still perceived as a real lever for collective performance, but with delays in implementation depending on the size of the company.**

While the 2021 survey confirmed that digital technology had acquired a central place in the daily lives of both executives and employees, it also confirmed that digitalization had accelerated in companies with, in particular, a certain familiarity with the concept of digitalization among employees remaining stable in 2022, with 76% of employees acculturated.

On the other hand, while the implementation of these plans was presented as a priority in 2021, it is clear that in 2022 there will be a significant increase in the number of companies that have not yet put these plans in place: 26% as opposed to 18% in 2021. This is a particularly divisive issue within companies, as the trend is not true for medium-sized companies. Only 3% say they do not have any such plans in place.

The question of the implementation of digitalization plans also seems to have an impact on the perception of the state of progress of digitalization in the company:

- Expectations are rising among employees with regard to digitalization:
  - o 48% of employees consider their company to be behind in terms of digitalization, which is 3% up from the previous year.
- By contrast, managers see this as a trend that is growing and intensifying:
  - o 69% of them consider the company to be ahead in terms of digitalization, i.e. 8% more than in the previous year.

Digitalization is all the more important as it provides reassurance in a challenging geopolitical and economic climate, with clearly identified priorities for employees: 92% want to see the security of their information systems tightened up. Among company executives however, pragmatism prevails. The uncertain context could have a real impact on the issue of digitalization: 33% of them plan to limit or postpone investments in digitalization, and 25% imagine reviewing the priorities of their digitalization plan.

## **Strong expectations for new technologies to meet customer and business expectations... and to further environmental transition**

The digitalization of companies and the gains it generates are clear to employees. In particular, the idea that digitalization provides strongly identified business and HR benefits is getting stronger:

- 72% of the workforce say it allows them to better respond to customer expectations (5% up from 2021),
  - o Meeting customer needs has become the primary benefit expected by employees this year. A business priority that can also be seen in the tools that managers are looking for. 62% of the answers concern the development of customer-oriented tools. A rate that rises to 82% for mid-sized and large enterprises.
- for 69%, it gives employees greater autonomy in their work, and more collaborative work methods (66%, i.e. 2% up from 2021).

## **But strong expectations for environmental transition: 49% believe that they have been able to reduce their environmental footprint through digitalization.**

The study confirms the impact of digitalization on their environmental footprint. It also reveals a very strong new expectation on the part of employees that is directly linked to environmental transition. The first expectation among employees concerns the emergence of solutions allowing energy savings of up to 37%.

Expectations that echo a major concern which is the environmental impact of digitalization: this is a clearly identified core issue regarding the transformation of uses with 73% of employees in large companies believing that the company has reduced its environmental footprint thanks to the development of new technologies and digitalization, and 23% of them thinking it has reduced "significantly".

**Although expectations are high, only 21% of companies claim to have fully integrated their IT department or team in the definition of their CSR policy.**

Regarding areas in which digitalization has had a palpable impact on the environmental footprint, there is a broad consensus among managers and employees on the established classification:

- 1) Work organization
- 2) Products and services offered
- 3) Production methods
- 4) Energy consumption in general

If the challenges of responsible digitalization are numerous for managers, support and training for employees appear to be the first issue to be addressed for 88% of them, followed by questions related to the processing and storage of data in line with regulations and ethics (77%).

**If new technologies are identified and appreciated by companies, the integration of these technologies in daily activities presents real contrasts.**

The Cloud and AI are the best-known technologies for 80% and 74% of employees respectively. The "metaverse" is identified by 38% of employees, NFTs by 32%, and blockchain by 28%.

And yet, one employee out of two uses new technologies on a daily basis. This usage tends to boost trust in technology (65%).

New technologies appear to be the source of many benefits, especially in mid-sized and large companies, with a very precise identification of the advantages (both for employees and for managers), for example:

- The cloud offers more agility and speed in digitalization projects
- Artificial Intelligence improves industrial manufacturing
- The cloud offers better data protection
- Blockchain helps to fight effectively against fraud thanks to better authentication and certification

**Digital: This is a tense but dynamic field in terms of jobs, where the acculturation of young people and women is a major challenge in order to respond to the growth of digitalization.**

To help companies meet these heightened and renewed expectations, the attractiveness of the sector is a major issue when it comes to training and recruiting people with the right skills. The study reveals that while the sector is perceived as dynamic for the career opportunities it offers, digital professions are still

poorly known for 80% of managers and require acculturation of young people right from middle school, according to 85% of company executives. This awareness seems to be all the more necessary among women since only 1 out of 2 thinks that these jobs are accessible to them.

- 62% of male employees versus 52% of female employees think that these jobs are accessible to women

According to Vincent Rouaix, Chairman and CEO of Inetum: "This survey confirms that in a tight context, both on economic and environmental issues, digitalization is becoming a lever of performance and trust for companies, due in particular to a growing phenomenon of acculturation within these companies. This acculturation to new technologies in particular encourages enthusiasm for the digitalization of business, and influences how employees and managers perceive the virtuous impacts of technology on their life at work. The digitalization of private companies and public institutions also implies more proximity and specific skills in our ecosystem. Acculturating young people and women is one of our main commitments. These conclusions echo Inetum's ambition, which is to work closely with its clients on a daily basis to promote the positive impact of digital flow, and to encourage more values to make digital technology one of the levers of success for environmental transition."

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## Survey methodology: 2 representative samples surveyed

Inetum's Digital Flow Observatory is a unique tool to reveal how two distinct populations see the stakes, and to monitor how these perceptions evolve from year to year. The CSA Institute helps Inetum to identify issues concerning digital transition in organizations.

- **1,010 employees** in France, aged 18 and up, assembled according to the quota method (gender, age, CSP, region and category of agglomeration), and interviewed with a questionnaire in the last quarter of 2022;
- **250 managers of companies** with more than 50 employees, chosen according to the quota method (sector, workforce size and location), sampled according to the size of the workforce in terms of employees, and interviewed with a phone questionnaire in the last quarter of 2022.

## About Inetum, Positive digital flow:

*Inetum is an agile IT services company that provides digital services and solutions, and a global group that helps companies and institutions to get the most out of digital flow. In a context of perpetual movement, where needs and usages are constantly being reinvented, the Inetum group is committed towards all these players to innovate, continue to adapt, and stay ahead. With its multi-expert profile, Inetum offers its clients a unique combination of proximity, a sectoral organisation, and solutions of industrial quality. Operating in more than 27 countries, the Group has nearly 27,000 employees and in 2021 generated revenues of €2.2 billion.*

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