

4.0 READY

4.0READY - "CONSULTANTS" SURVEY "ANALYSIS OF THE HUMAN DIMENSION IN 4.0"



Alongside its "Industry of the Future" strategy, Wallonia is invested in the Interreg Europe "4.0 Ready" project which aims to enhance **the capacity of SMEs** to embark on Industry 4.0 and develop the **digital skills** of workers.

In order to analyse the extent to which **human aspects** are taken into consideration in companies' digital transformation plans, this **survey** was sent to 634 consultants approved for the Walloon business voucher scheme for "growth" and/or "digital" themes.

The objective was also to ask the consultants on the following questions:

- ▶ Should companies' digital transformation include developing workers' skills? How do consultants position themselves in relation to this issue?
- ▶ What do they need to achieve further developments in the human dimension of companies' digital transformations?
- ▶ Has COVID-19 had an impact on the content of their projects?

From a practical perspective

Survey duration:

the survey remained open for 2 months (from 05/07 to 06/09/2021). A reminder mailshot was sent on 23/08.

Survey timescale:

this survey collected information on the consultants' activity over the last 12 months

Completion time:

the average completion time for the survey was 11 minutes 7 seconds, which corresponds with the target objective of the Training WG.

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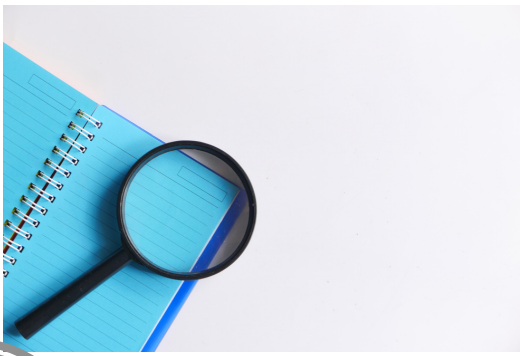
From a methodological perspective

Sample size:

the sample appears credible and workable given the number of respondents: 107 out of 634 contacts, or just under 1/5th.

Sample representativeness:

the survey results should be analysed in light of the profiles of the 17% of consultants who responded. Furthermore, we did not make any selection regarding the business sectors of the consultants questioned.



MAIN FINDINGS

1

AWARENESS OF THE IMPORTANCE OF THE HUMAN DIMENSION

The survey suggests that the Business Voucher approved respondents are aware of the human dimension, regardless of whether they have been recruited via the growth or digital vouchers.

In fact, **92%** of respondents said they were aware of this dimension. Specifically, **31%** of respondents considered it to be very important and 61% as fundamental.

11. Based on your experience, how important are the human and organisational dimensions in the success of a digital transformation?

● Not important	0
● Important but not essential	9
● Very important	34
● Fundamental	65



2

LIMITED EXPERTISE AVAILABLE TO COMPANIES ON THE HUMAN DIMENSIONS

Although 92% of the consultants responding said that they are aware of and interested in the human dimensions, they are more interested in an approach that supports "saying" rather than "doing".

Indeed, they stated that **they do not have the expertise** to support the company's human dimension in the transformation processes, regardless of whether this is related to growth or digital transformation.

3

FEW CONSULTANTS INCORPORATE THE HR DIMENSION INTO THEIR PROJECT

Beyond the declarations of intent, only **12%** of consultancy requests relating to digital transformation processes incorporate the HR and organisational dimension into their support process.

4

LITTLE USE OF AVAILABLE TOOLS

Barely **18%** of respondents reported that they use the resources available to them to raise awareness of the company's human and organisational capital: **DigiScore** and **Digiscan** tools, European reference frameworks such as **Digcomp** and methods such as "**Made Different**".



5

MANAGEMENT SUPPORT IS THE PRIORITY INTO WHICH MOST IS INVESTED

Among the respondents, **37%** of consultants reported being **involved** and **16%** as **specialising** in the management of the human and organisational dimensions of the companies they support.

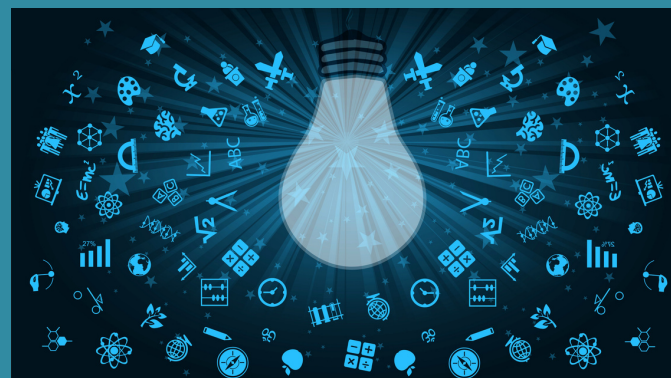
In addition, it should be noted that in relation to management support:

- 43% of respondents are involved in the "Support in developing a transformation plan"
- 36% of respondents are involved in the "Awareness of management methods adapted to digital literacy skills"
- 36% of respondents are involved in the "Support for the development of a managerial dynamic adapted to the digital culture"
- 36% of respondents are involved in the "Awareness of working methods adapted to digital literacy skills"

6

THE WISH TO KNOW MORE ABOUT IT

Half of the respondents wanted to broaden their horizons and maintain **more regular contact with people and organisations who specialise in the human dimensions**, and nearly half of the respondents indicated that they do not have contacts in their professional network that would allow them to enhance their knowledge of the subject.



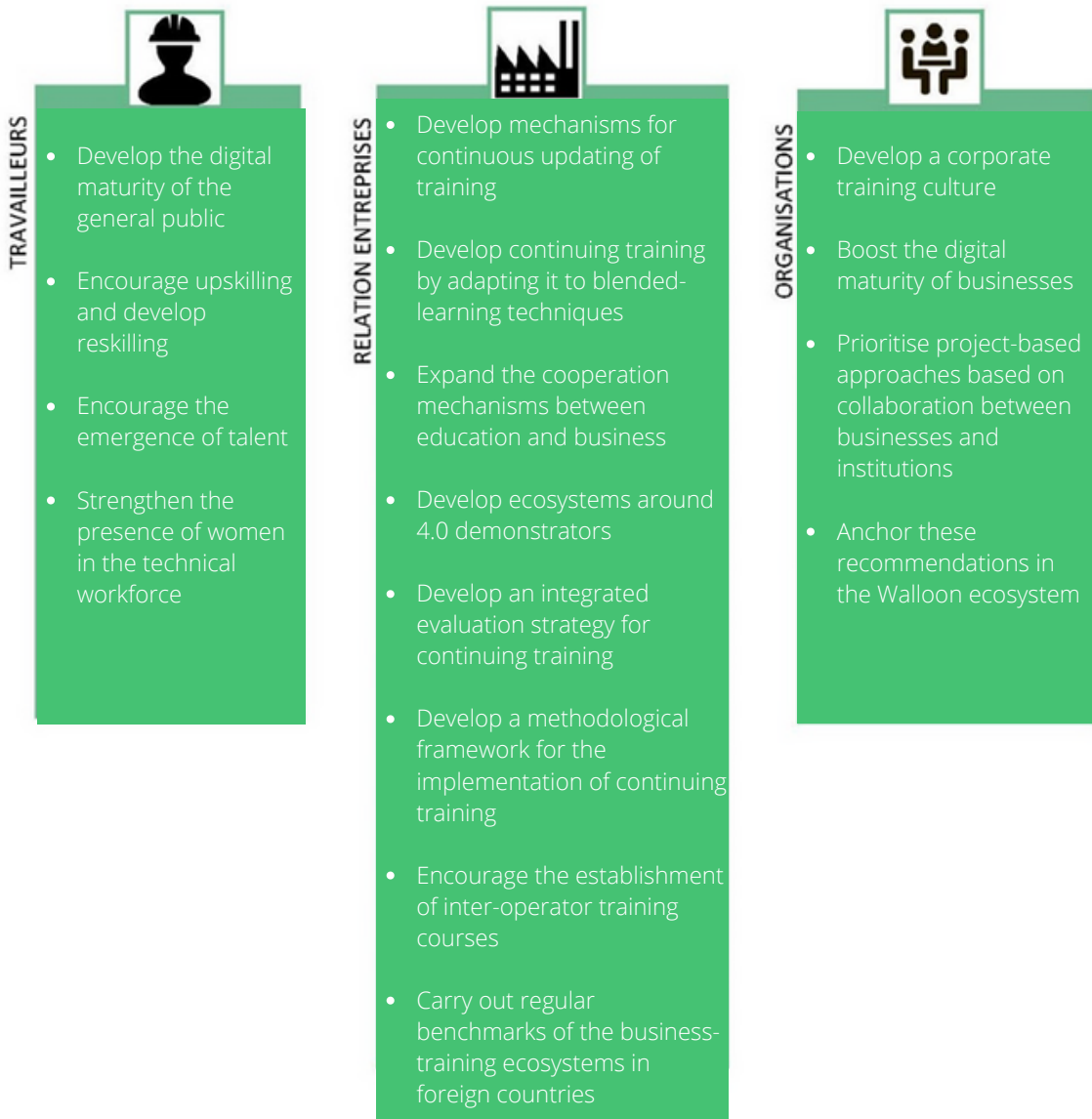
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CONVERGING TRENDS

The results of the consultants' survey confirm (and thereby reinforce) recent findings and studies. -The "Prospective analysis on the development and skills needs of Industry 4.0" (2020) had already highlighted 16 major recommendations divided into 3 groups, designed to support Industry 4.0 in Wallonia.

Directly related to our survey results, we support:

1. The importance of establishing **a corporate training culture** and, at the same time, the need to increase the digital maturity of citizens;
2. The presence, or even prevalence, of **so-called "soft" skills** alongside purely technical and operational knowledge.



The "2020 Barometer of Companies", carried out by the Agence du Numérique, indicates that "if there is one area in the digital transformation of companies that is seeing under investment, it is change management. In fact,

- 2/3 of managers do not perceive digital as a strategic opportunity for their company and 28% of managers consider "that no digital transformation is necessary in their business";
- 74% of managers say they don't need new skills to progress in their digitalisation while 58% of workers say they need additional training and guidance in terms of technology.
- In the Walloon Region, only 12% of companies employing staff have trained at least one employee in a digital subject in the last two years.

CONCLUSION AND RECOMMENDATIONS



While 17% of respondents said that they are aware of the HR and organisational dimensions, **few seem to have the expertise or useful contacts to support companies** in these areas.

This survey confirms the perceptions of experts in contact with companies that there is currently an under investment in the human and organisational capital essential to the success of digital transformation.

Given this reality, the recommendations are as follows:

Increase and accelerate awareness initiatives

The aim is to continue to raise companies' awareness of the importance of the human factor in the digital transformation process. Although awareness initiatives are already underway, they are not sufficiently supported in terms of resources to have a real impact on the ground.

Identify "Human and Organisational Capital" experts

It would be wise to refine the initial mapping of providers who identify themselves as specialists in human and organisational capital, for example through a survey. Secondly, companies must be given the means to identify them by creating a specific label/accreditation, for example.

This approach aims to offer companies the opportunity to identify and call upon them to optimise their chances of success in the digital transformation of their company.

Raise consultants' awareness of the human challenges

In order to increase the impact of awareness, consultants should be made aware of both the human and organisational challenges that underpin digital transformation and the resources available. If they are not experts in human and organisational capital, having a minimum knowledge on the subject would enable them to give companies appropriate guidance towards useful tools and/or specialist consultants.

Ascertain the position of manufacturing companies regarding digital transformation, their needs and points of interest

As a logical extension of this survey, it seems appropriate to ask companies about their feelings regarding digital transformation and the consideration of human and organisational aspects, so as to identify the obstacles and levers to the integration of the human dimension.



RELATED THOUGHTS

In addition to the information sought through the survey, other points of attention have been highlighted that we feel are important to share.

Mobilisation of growth vouchers

The survey indicates that 75% of respondents were recruited for projects under the "growth" voucher, which has a broader spectrum of action, than "digital" projects under the digital voucher.

Mobilisation of projects on the adaptability of companies and their Business Model following the COVID-19 crisis

In the context of growth vouchers, 40% of respondents indicated that they support business differentiation, marketing, financial management, workflow management, and internal management in their consultancy projects.

In the context of the COVID-19 crisis, projects that allow the company to **adapt in an emergency** and even to survive economically are therefore subject to the greatest support.

Weak mobilisation of vouchers on cybersecurity aspects

In the context of the "digital" voucher, the survey highlights that it is barely used for cybersecurity projects.

In fact, out of 107 respondents only 3 projects were completed for this purpose. This is significantly less than the other two aspects covered by the digital maturity vouchers: audit or diagnosis and support for the implementation of an action plan. This is disconcerting in the context of the COVID-19 crisis and the increase in teleworking.