Business Transformation Index 2022

The keys to successful business outcomes in Ireland

BTI 2022 IRELAND

(expleo)

Foreword

2022 represents a defining moment for businesses in Ireland – and around the world. For two years, we have experienced upheaval, challenges and changes to the way we work. Many businesses have survived, some have thrived. But now we are looking to the future; a future that is worlds apart from the one that we thought we were working towards before the global pandemic stopped us in our tracks.

Businesses have transformed beyond recognition, buoying themselves and the economy. The Economic and Social Research Institute estimates that the Irish economy grew by 13.6% in 2021[1], supported by multinational activities and strong export figures. Our own research, published here in our third annual Business Transformation Index, suggests that businesses are feeling good, too. Most (84%) organisations in Ireland report that their profits will be higher in the next five years. Just 2% said they will be lower.

There is every reason to be positive. But now we must look at the long-term impact of those transformations. Are they sustainable? And were the changes that we implemented – such as widespread remote working – rolled out effectively, to the benefit of businesses and employees alike?

For two years, we were in a race. Businesses were racing to adopt technologies as fast as possible to stay afloat. Technology was our lifeboat in an unpredictable sea of change, so it is not surprising that 80% of organisations in Ireland say they have accelerated their digital transformations as a direct result of the pandemic. That is up from 48% the previous year, suggesting that some were slower to adapt as they held out hope for a speedier return to 'normal'.

But effective digital adoption takes more than just a tech spending spree. It is a process that must include, and consider, the entire workforce. It is not just a systems shift; it is a cultural one that requires a holistic approach permeating entire organisations.

Now is the time for businesses to be brave: to have the courage to implement change and to bring their people on that journey with them. Technology is what brought us here, but it is the people who will make it work.

Our third annual Business Transformation Index examines how enterprises in Ireland are using innovation to overcome challenges including skills shortages and COVID-19, while excelling in focus areas such as customer experience and sustainability. This report will enable business and IT leaders to benchmark themselves against others in the market while providing insights and advice on how organisations can approach and overcome some of the biggest challenges of our changed new world.

Phil Codd
Managing Director, Expleo Ireland

1) https://www.esri.ie/news/growth-remains-strong-despite-ongoing-pandemic-uncertainty-and-greater-than-expected-rates-of

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Key findings

84% of organisations in Ireland expect profits to increase over the next five years

80% of business and IT leaders say that they have accelerated their digital transformations as a direct result of the pandemic, up from 48% the previous year

25% One-in-four businesses in Ireland are exceeding their digital transformation budgets

79% of large enterprises are experiencing difficulties with hiring and retaining tech talent, compared to 62% of smaller companies

77% of business and IT leaders see skills gaps and talent shortages as a top challenge to business and digital transformation

67% of business and IT leaders believe skills shortages are negatively impacting Ireland's ability to build its digital economy

Just 36% of organisations plan to address their hiring and retention challenges in the long-term through staff training

Irish enterprises are using **digital transformation to...**

... improve customer experience	51%
... boost sales and revenues	41%
... achieve revenue growth	41%

Business and IT leaders in Ireland say that **automation ...**

... is helping to accelerate speed to market	51%
... helps employees to focus on value-added tasks	47%
... accelerates the provision of digital services to customers	42%
... speeds up processes	42%

90% of business and IT leaders in Ireland say they need a better understanding of how wider digital adoption will impact their environmental footprint

55% of business and IT leaders favour a structured, methodical approach to digital projects as opposed to a 'fail fast' approach
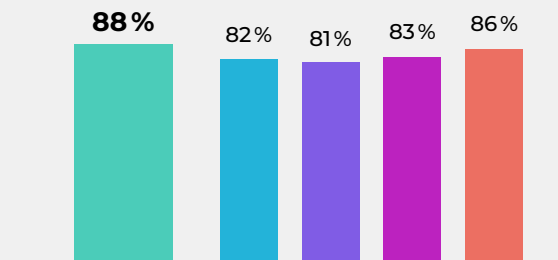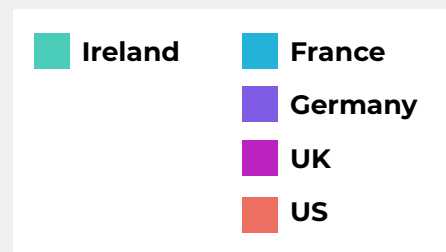
54% of businesses in Ireland have formalised a hybrid working model in their workplace, while 37% plan on doing so
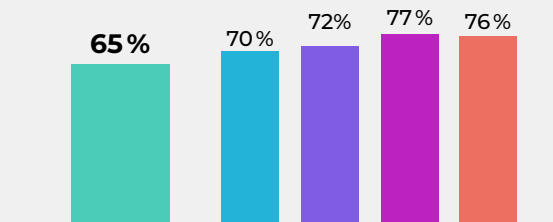
42% of organisations in will allocate 10% or more of their technology budgets to making their IT infrastructure and services more sustainable and green
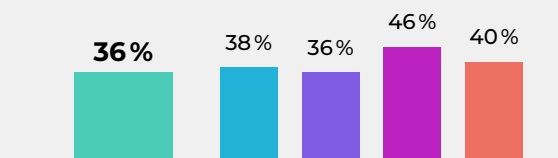
Country comparisons

Legend:
- Ireland
- France
- Germany
- UK
- US

Our board is more likely to approve new IT strategies and innovations because of COVID-19.

- Ireland: **88%**
- France: 82%
- Germany: 81%
- UK: 83%
- US: 86%

We believe that organisations have under-invested in the skills base of their employees.

- Ireland: **65%**
- France: 70%
- Germany: 72%
- UK: 77%
- US: 76%

In the long-term, we will tackle skills shortages by investing in training for staff.

- Ireland: **36%**
- France: 38%
- Germany: 36%
- UK: 46%
- US: 40%
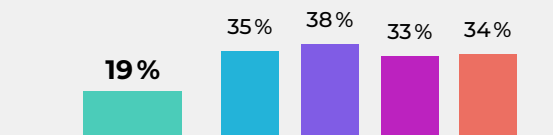
We will use automation and AI to address skills shortages.

- Ireland: **19%**
- France: 35%
- Germany: 38%
- UK: 33%
- US: 34%
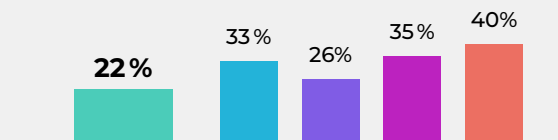
We plan to hire staff from more diverse backgrounds in order to solve our talent shortages.

- Ireland: **22%**
- France: 33%
- Germany: 26%
- UK: 35%
- US: 40%
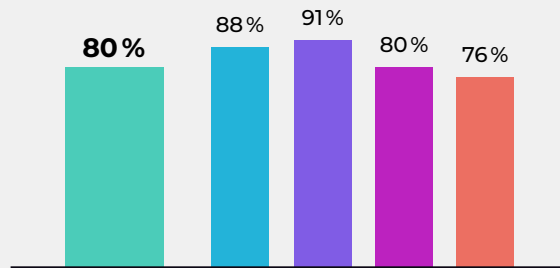
COVID-19 accelerated our digital transformation plans.
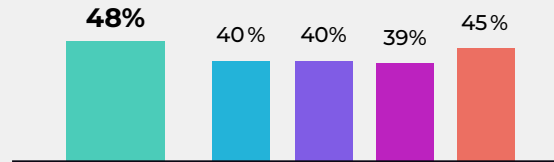
- Ireland: 80 %
- France: 88 %
- Germany: 91 %
- UK: 80 %
- US: 76 %

Process automation will be a focus area for our transformation plans over the next two years.

- Ireland: 48%
- France: 40 %
- Germany: 40%
- UK: 39%
- US: 45 %
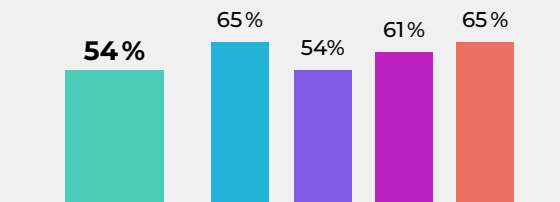
We believe that the organisations with the boldest digital ambitions will be the best placed to succeed.

- Ireland: 54 %
- France: 65 %
- Germany: 54 %
- UK: 61 %
- US: 65 %
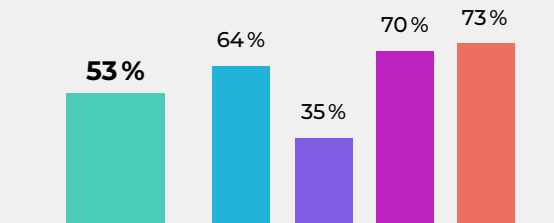
We encounter problems driving cultural change and adopting a 'digital-first' mindset.

- Ireland: 53 %
- France: 64 %
- Germany: 35 %
- UK: 70 %
- US: 73 %
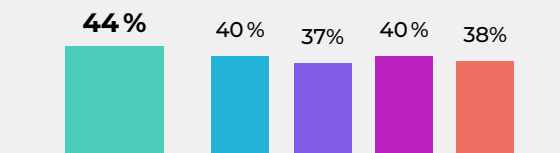
We see quality assurance as a focus area for our transformation plans over the next two years.

- Ireland: 44 %
- France: 40 %
- Germany: 37%
- UK: 40 %
- US: 38%

Legend:
- Ireland
- France
- Germany
- UK
- US
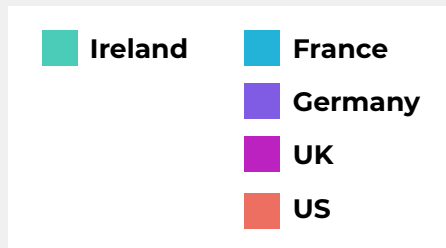
Challenges

79 % of large enterprises are experiencing difficulties with hiring and retaining tech talent, compared to 62 % of smaller companies

77 % of business and IT leaders see skills gaps and talent shortages as a top challenge to business and digital transformation

53 % of organisations in Ireland encounter problems with driving cultural change and adopting a 'digital-first' mindset

89 % of businesses in Ireland believe that they could be doing more to make their IT infrastructure and projects more environmentally friendly

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Attracting and retaining the right people

Business and IT leaders across Ireland are frustrated. Research from LinkedIn shows that the majority of Irish workers (63%) are considering changing jobs in 2022[2]. That leaves businesses grappling to find a balance that meets their own business needs, as well as the needs of a workforce in flux. The stakes are so high for businesses that recruitment agency Morgan McKinley says the battle for talent is resulting in pay hikes for HR professionals of up to 20%[3].

2022 will show us that employees can and will change jobs if they find one that suits them better. The challenges that this brings to businesses are exacerbated for those looking to hire and retain tech talent. Interestingly, our research found that it is Ireland's biggest companies – which tend to be the ones with the most competitive salaries – who are struggling the most. Almost all (79%) large enterprises[4] said that hiring and retaining tech talent is an issue for them, compared to 62% of smaller organisations.

With technology so ingrained in organisations' business strategies, this issue is having a significant impact on their plans for transformation and innovation, as the very people who should be leading these initiatives are in short supply. In fact, 81% of companies say that IT leadership and management roles are the most difficult to recruit for, and retain, at the moment. It is not surprising, then, that more than three-quarters (77%) of organisations see skills gaps and talent shortages as a top challenge to business and digital transformation, while 67% believe it is negatively impacting Ireland's ability to build its digital economy.

The irony of the situation is that Irish boards are now more open than ever to digital innovation. While IT professionals have long known the business potential of new technologies, the pandemic has been somewhat of an enlightenment period for CEOs, CFOs and board members. They have seen that the benefits are manifold. Our research shows that 48% of businesses are using digital transformation to bring new offerings to market; 45% are using it to transform business models and ways of working; and 41% say it is helping them to increase sales and revenues. As a result – and more than any other country surveyed – 88% of Irish organisations say that their board is more likely to approve new IT strategies and innovations because of COVID-19, up from 73% the previous year.

2) https://www.rte.ie/news/business/2022/0119/1274543-job-linkedin-survey/

3) https://www.independent.ie/business/personal-finance/workers-to-get-pay-hikes-of-20pc-in-bidding-wars-for-talent-as-skill-shortage-grows-41231297.html

4) Enterprises with more than 10,000 employees

We are seeing much greater harmony within organisations about the benefits of digital transformation. But this willingness is being hampered by hiring challenges – and not all respondents agree that investment in staff skills is the answer. Just 65 % of those surveyed in Ireland (compared to the global average of 73 %) believe that organisations are not investing enough in the skills base of their employees.

That view translates to Irish organisations' training plans for their workforces. Just 36 % of those surveyed as part of our Business Transformation Index plan to address the problem by investing in staff training, which again sees Ireland fall short of the global average of 40 %, rising to 46 % in the UK. Reassuringly, our research shows that Irish businesses are also less likely to see automation as the solution to hiring difficulties. Globally, 34 % of businesses are using automation and AI to address skills shortages, compared to just 19 % of Irish organisations. More popular solutions – but ones that are not being tapped into enough – include outsourcing more functions (28 %) and hiring teams with more diverse backgrounds (22 %). The latter is significantly lower in Ireland than enterprises in other countries, averaging 33 % globally.

Approaches to addressing skills shortages

█ Ireland
█ Global average

	Investing in staff training	Using automation and AI	Outsourcing more functions	Hiring teams with more diverse backgrounds
Ireland	36 %	19 %	28 %	22 %
Global average	40 %	34 %	40 %	33 %
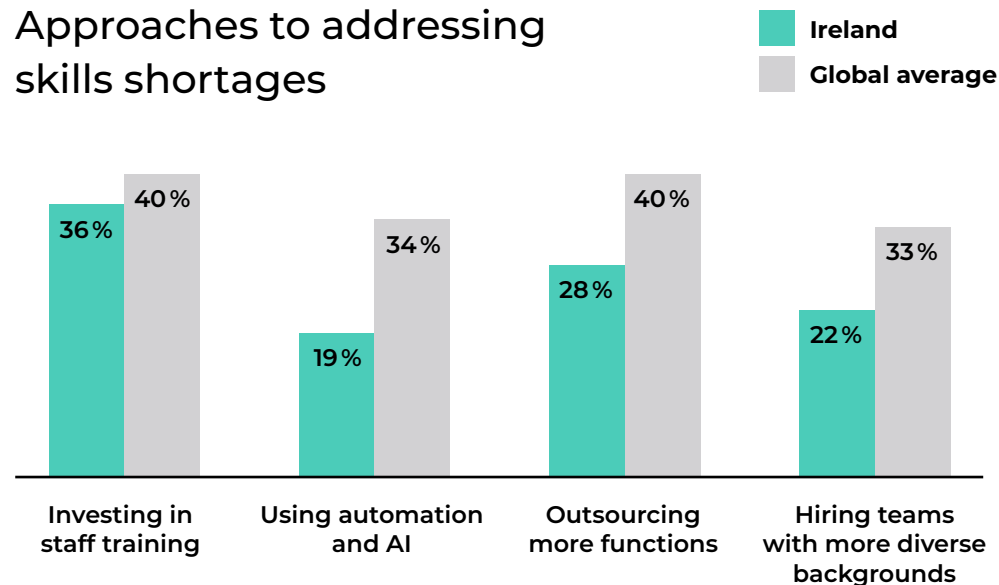
Enhancing the customer experience

The number one goal that Irish organisations are seeking to achieve through digital transformation is delivering the best customer experience. More than half (51 %) of respondents in our research said that they will use digital transformation to improve the customer experience. When even the most loyal customers will turn their backs on a brand after just one poor customer experience, the stakes are high.

But again, Irish organisations are being hampered by skills shortages and nearly one-third (32 %) of those surveyed in our Business Transformation Index said that UI and UX roles are among the most difficult to attract and retain. This is a significant problem. With 41 % of organisations in our survey using digital transformation to achieve revenue growth, customer experience must be embedded in the solution.

Focus areas for transformation plans

48%	47%	46%	43%	35%	34%	26%
Process automation	Cybersecurity	Cloud adoption	Business intelligence systems	E-commerce and trading online	Internet of things	Machine learning and AI

Embracing new technologies

It is clear that businesses see digital transformation as a long-term solution to achieve their business goals: improving the customer experience, the employee experience and ultimately, their bottom lines. During the most challenging months of the pandemic, businesses in Ireland relied on technology to see them through. We found that on average, COVID-19 accelerated Irish businesses' digital transformation plans by 11 months. But what does this advancement in technology adoption look like?
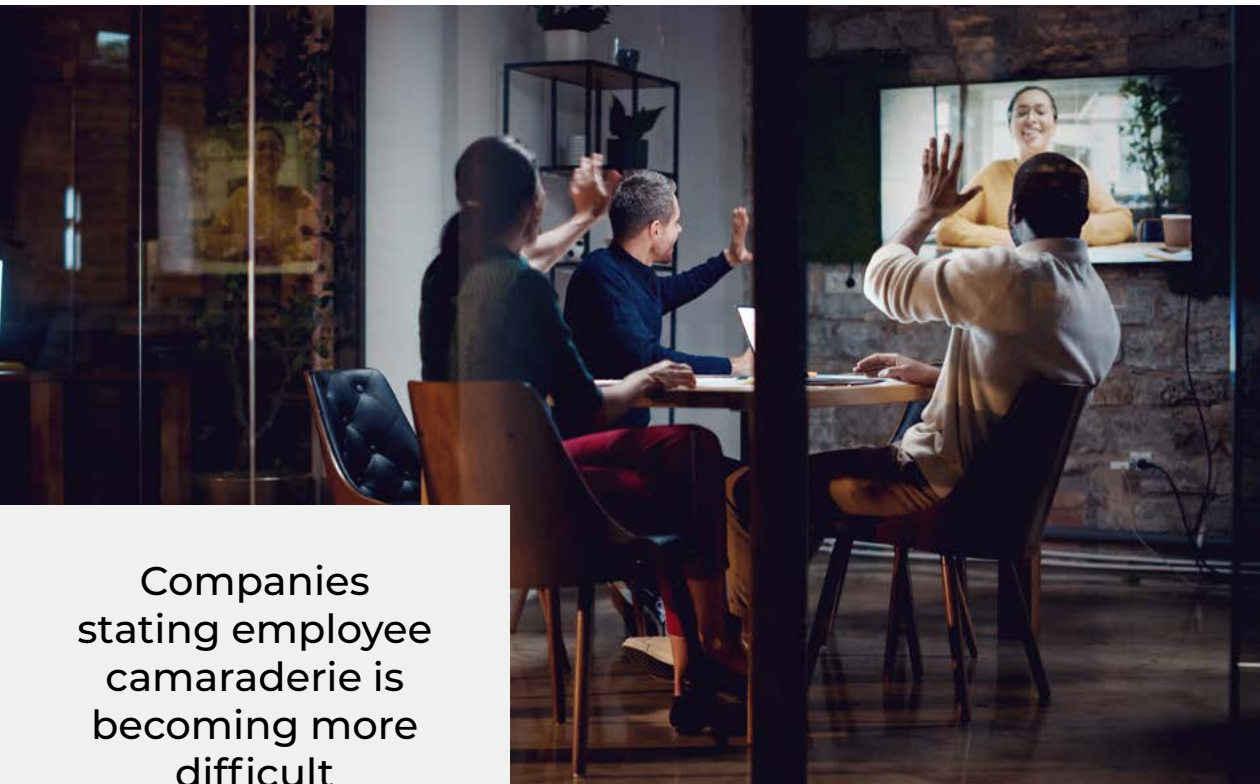
Almost half (48%) of organisations say that process automation will be a focus area for their transformation plans within the next two years – more than the global average of 42% – and they see the benefits as far-reaching. According to 51% of respondents, process automation is helping them to accelerate speed to market, while 47% say it is helping employees to focus on value-added tasks. Meanwhile, 42% of respondents say that it is helping to accelerate the provision of digital services to customers and that it is speeding up processes.

The emphasis on automation is followed closely by cybersecurity, with 47% of organisations saying it will be a major focus area for their transformation plans over the next two years. That is closely followed by cloud adoption (46%), reflecting the role of cloud technology in helping organisations to innovate at speed and overcome cyber threats. Other key focus areas include business intelligence systems (43%); e-commerce and trading online (35%); internet of things (34%); and machine learning and artificial intelligence (26%).
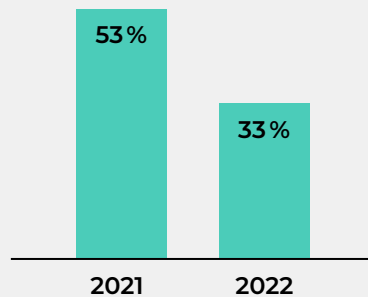
As technology continues to be used to meet business needs, 36% of businesses in Ireland believe that their technology budget will increase by 30% over the next five years. But with one-in-four Irish businesses admitting to reviewing their digital transformation budgets, there may be greater budget increases on the horizon.

Despite the apparent enthusiasm – backed by increasing investments – to embrace new technologies, Ireland remains relatively cautious when it comes to digital transformation. Only 54% agree that the organisations with the boldest digital ambitions will be the best placed to succeed, compared to 61% of organisations globally. More than half (55%) – slightly above the global average of 51% – favour a structured, methodical approach to digital projects as opposed to a 'fail fast' attitude.

Embracing cultural change

Our research found that 53 % of organisations in Ireland encounter problems with driving cultural change and adopting a 'digital-first' mindset. And while that may seem like a lot, other regions are finding it even more of a struggle, with 70 % in the UK and 73 % in the US citing it as an issue. So while an organisation's leadership might be pushing for transformation, its employees could be pedalling against the current of change.

One of the greatest cultural changes of the last two years – and one which was facilitated through technology – was the move to remote working, with most workforces migrating from being fully office-based to being fully remote. And while the benefits of remote working were heralded at the start of the pandemic, our research suggests that business leaders and their workforces are now grappling with how to make it work long-term.

One-third (34 %) of those we surveyed believe that remote working makes it more difficult to onboard new colleagues and get them up-to-speed quickly. A similar proportion (33 %) stated that employee camaraderie is becoming more difficult – although that is down from 53 % who reported it as being a problem last year, suggesting that businesses and employees are becoming more accustomed to the culture changes that remote working entails. Nonetheless, as organisations continue to struggle to retain talent, this remains is a significant problem for them.

Companies stating employee camaraderie is becoming more difficult

53 %	33 %
2021	2022

We have seen how digital transformation has, and will continue to, define businesses and their plans for the future. We know that many see it as a means to increase revenues, but that can only happen if an entire organisation is on-board and understands the need for change. It requires a collective mindset and a shared vision for the future. But this, in itself, presents a challenge.

Conscious of employees' wishes for more flexible working arrangements; businesses are balancing their own needs with those of their employees by introducing hybrid working models. More than half (54%) of companies have now formalised a hybrid working model in their workplace, while a further 37% are planning on doing so. Meanwhile, 48% have introduced flexible location policies with an additional 42% planning to do this – a move that will appeal to those who may have moved location, but not their job, during the pandemic.

Clearly, there is commitment from employers to stay the course when it comes to remote working. In fact, more than three quarters (77%) of those surveyed say that they already have, or are planning to, substantially reduce the number of workspaces and branches that they work from.

Formalisation of a hybrid working model

54%
Complete

37%
In planning
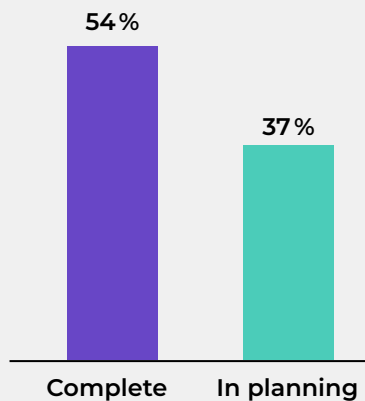
Introduction of flexible location policies

48%
Complete

42%
In planning
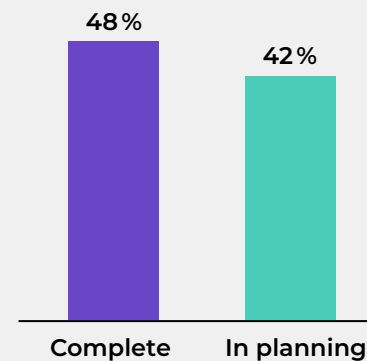
Sustainability

While the pace of digital transformation is helping businesses to reach their financial targets, it can pose a question regarding their sustainability targets. As an increasing proportion of organisations explore the prospect of becoming climate neutral, they are conscious that IT must be a part of this.

But they are not there yet. The vast majority (89%) of businesses in Ireland believe that they could be doing more to make their IT infrastructure and projects more environmentally friendly. A similar proportion indicate that they don't fully understand how digital transformation is impacting their carbon footprint.

However, there is optimism. Almost every enterprise (99%) has plans to dedicate a proportion of their technology budget to making their IT systems more environmentally sustainable and green, with 42% planning to allocate 10% or more.

Recommendations

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36 % of organisations plan to address hiring and retention challenges in the long-term through staff training

22 % of respondents plan to address skills challenges with a greater focus on diversity

44 % of businesses in Ireland see quality assurance as a major focus area for the next two years

19 % of businesses in Ireland believe that the solution to our skills shortages is to automate more roles

Invest in skills

Our research shows that skills – or lack thereof – is a major issue for organisations in Ireland. More than half (56%) of businesses admit that problems with hiring and retaining talent are so great that they are having a negative impact on their business' transformation plans; a worrying statistic when so many are relying on digital transformation to achieve their overall business goals.

Despite the problems that skills shortages create, our research suggests that there is an inertia to act decisively on the matter. Just 28% of organisations plan to address technical skills shortages in the long-term by outsourcing more functions to third parties, down from 30% last year. We are also seeing fewer organisations hiring contractors, with 18% saying they are doing so this year versus 31% last year. And yet, businesses are not investing in their own teams. We found that an underwhelming 36% of organisations plan to address hiring and retention challenges in the long-term through staff training.

Investment in skills is key. This doesn't just ensure that an organisation has the best minds working towards its success, but it also prevents valued employees from becoming frustrated. Research from LinkedIn shows that an enormous proportion – 94% – of employees would stay at a company longer if it invested in their career[5]. Workforces must feel valued and not only know that their employer is investing in their own development, but also the success of their entire team.

At Expleo, we recognise this need through our Expleo Academy, which provides our colleagues with professionally accredited programmes across the spectrum of our client service offerings. It is crucial that as part of this, every team member has regular career development

conversations with their manager to ensure that we are helping them to meet their own career goals and that we foresee skills gaps before they emerge.

Third-party consultancies can also help to fill skills gaps on teams, or even lead on the delivery of digital projects. This can not only ensure that a business stays ahead of the competition, but it can also boost morale on teams that may feel demotivated by relentless skills setbacks.

Hiring managers must think outside the box when it comes to technical roles. Some businesses are now exploring the idea of apprenticeships, which too often are an untapped resource in Ireland. Rather than consistently looking for university qualifications, businesses are starting to see that they can develop talent themselves. With the right resources, on-the-job skills can be taught, but the drive and passion to succeed in a career in technology cannot.

5) https://learning.linkedin.com/resources/workplace-learning-report-2018

Diversity and inclusion

One of the most concerning statistics in this report is that so few organisations in Ireland seem to see a link between diversity of their employees and skills challenges. In the long-term, just 22 % of respondents plan to address skills challenges with a greater focus on diversity. When you look at other regions like the United States, that figure rises to 40 % – and even that is not enough.

Expanding the diversity of an organisation isn't just the right thing to do; the business case is too compelling to ignore. Diversity of thought is healthy for an organisation's bottom line – and the people who make that organisation. It is therefore important for businesses to think creatively when they are hiring for positions. Are they using the same tried and tested methods, or are they seeking new channels to reach a more diverse set of potential candidates?

At Expleo, our Returners Programme – aimed at women who are seeking to return to the workforce following a career break – is helping us to increase female representation in our workforce by 20 %. Our STEM ambassadors, meanwhile, engage with local schools to reach out to underrepresented groups, or those who face barriers to employment, to inspire them to pursue a career in STEM. And we partner with the non-profit Junior Achievement Ireland / Young Enterprise to educate young people, including those from deprived areas, about entrepreneurship, employability, financial literacy and the value of STEM.

Organisations may also – albeit unwittingly – be excluding certain groups through their job ads. It is important to analyse all job ads for any unconscious bias and ensure that the language used is inclusive and likely to appeal to all groups of potential applicants.

The conscious effort to become a more diverse organisation must be underpinned by a robust, exciting inclusion policy. Diversity and inclusion committees can support this. It is, however, vital that they are championed by the most senior executives and that all initiatives are employee-centric.

Businesses planning to address skill challenges with a greater focus on diversity

	Ireland	United States
	22 %	40 %
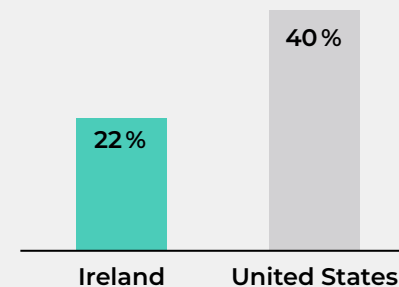
Be bold, be agile

Something that we are seeing across many sectors is that incumbent organisations are struggling to compete with the newer, agile ones. Businesses that have the technology to move quickly, accompanied by a digital-first culture across all levels of the company, are the ones who are better positioned to disrupt and therefore succeed.

Our research found that a large proportion (55%) of Irish organisations prefer a structured, calculated approach to innovation. This can particularly be the case for those operating in the healthcare and pharmaceutical industries, as well as public sector and not-for-profit organisations.

Modern businesses need to think like modern businesses. They need an openness not just to trying new technologies, but also to failing. The 'fail fast' approach enables organisations to learn from their efforts and where they went wrong, making future success more likely.

The key here is agility. It requires brave decision-making without the fear of what might happen, and an environment that is open to, and accepts, a change of mind. A truly agile business can pivot and move in the moment, without being held back by legacy systems – or legacy thinking.

Enterprises don't – and shouldn't – just go agile overnight. Instead, they should assess a problem in a small part of their business and examine how an agile approach can help. It is important to gather timely, live feedback from employees, suppliers and customers as the new approach is applied and act on that feedback quickly. If an effective solution is found, then it can be extended to other relevant teams and areas of the business.

Remember: being agile is not about getting it right from the start; it is about experimenting, learning, acting and adapting – and even failing. Teams must be supported regardless of the outcome of a new agile approach. It will inspire innovation and encourage individuals to problem-solve.

Focus on quality

60% say that an insufficient focus on quality and reliability is leading to a loss of confidence in business and digital transformation projects

Agility is central to the modern organisation, but equally as crucial is quality. We know from our own research that organisations are focusing on user experience (UX). Central to this is quality assurance. Without it, businesses will rapidly shed customers. Thankfully, it is on the radar for many, and we found that 44% of businesses in Ireland see quality assurance as a major focus area for the next two years. That is a higher proportion than any other market included in our Business Transformation Index research, however it should be front and centre in the minds of any company that is looking to become a digital leader.

Although quality assurance may be a focus, our research indicates that businesses are struggling to achieve it. Some 60% of business and IT leaders in Ireland say that an insufficient focus on quality and reliability is leading to a loss of confidence in business and digital transformation projects.

By working with a quality assurance partner, businesses can ensure that quality is embedded in every step of the innovation journey: from concept to delivery. This can be particularly helpful as 39% of business and IT leaders say that quality assurance roles are difficult to recruit for and retain. Quality assurance partners can effectively support the entire innovation journey, while also helping to prevent delays in the delivery of projects, they should also ensure that increasingly complex regulatory and compliance requirements are seamlessly achieved.

# Getting the balance between humans and technology

The world of work is moving so fast, it can be hard for businesses and their employees to keep up. And while it kept businesses and economies afloat during repeated lockdowns and uncertainty, widespread remote working is now losing some of its shine.

Organisations and commentators talk about The Great Resignation, and it is happening. For many, changing jobs nowadays is simply a case of changing laptop. An employee's surroundings and their routines stay the same and that can impact their company loyalty. We are social animals, but we also have lives outside of work that we want to – and should – lead. There is a balance to be had and that doesn't just apply to remote working, but all digital projects that impact workforces.

Technology works when it augments the human mind and skills. We have learned that if you don't have an excited human element, it will not work. Businesses in Ireland seem to understand this and only a small proportion (19 %) believe that the solution to our skills shortages is to automate more roles – compared to 34 % of organisations globally.

Change is inevitable, but the pace of change over the last two years was not. Organisations who had little time to assess the impact of these changes as they were happening now need to evaluate if they will work long-term. Value-stream mapping, accompanied by employee interviews, can help managers to understand pain points and opportunities that may have gone unnoticed. Process mining on system logs and analysis of usage data, meanwhile, can establish if new technologies are being under-utilised – or if they are needed at all. These activities can be used alongside future state modelling to understand long-term benefits or impacts.

Businesses believing automating more roles is the solution to skills shortage

|	Ireland	Global average
	19 %	34 %
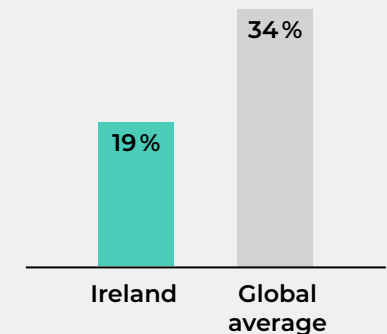
Conclusion

It has been two years of change. COVID-19 forced enterprises in Ireland to ignite their imaginations and accelerate their adoption of digital technologies.

Now, it is time to make those transformations last and ensure that they will continue to achieve excellence, even when – dare we think it – there is no longer a global pandemic. We must work together to ensure the changes that we made were meaningful ones not just for business, but for our people too.

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But it is not a time to slow down. A new era of innovation has been born; one which opens up endless possibilities and discoveries. Technology has become our enabler and our differentiator, but it cannot be retrofitted on top of a workforce. If 2021 has taught us anything, it is that humans must continue to be the beating heart of every organisation.

For two years we have been hearing – and talking – about a "new normal", but what does that mean? And what will it look like? A top priority for businesses now is to re-engage a disenchanted workforce. 2022, therefore, must be the year of a cultural renaissance. Businesses must invest time and budgets in their people in order to excite them for the journey ahead.

2022 will be a year of change, but also of opportunity. Let's do it together.
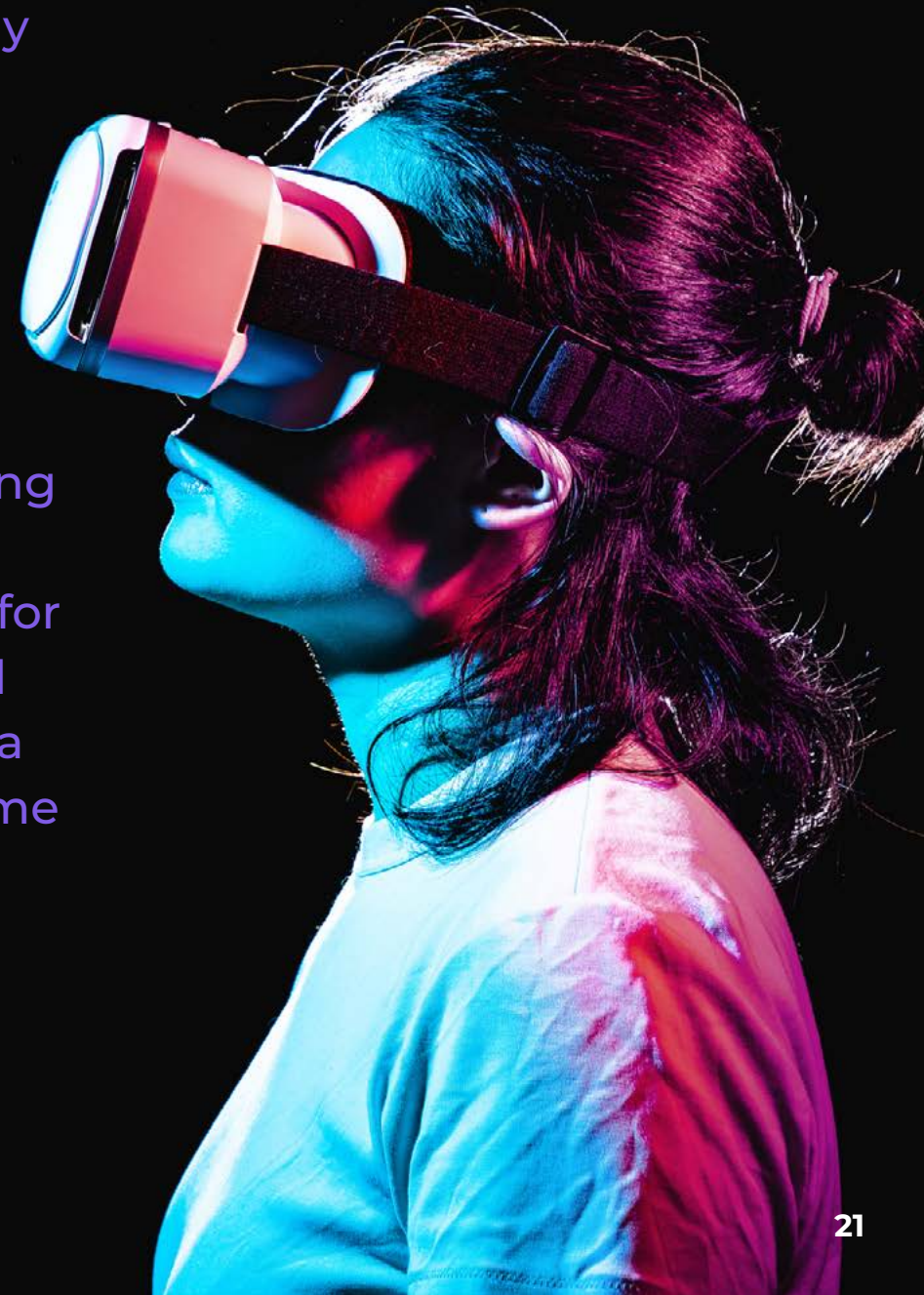
Talk to us

About Expleo

A global engineering, technology and consulting service provider, Expleo helps you achieve your ambitions and future-proof your business.

Offering a smart blend of bold thinking and reliable execution, we fast-track innovation through each step of your value chain, providing a wide range of services in Business Transformation, Operational Excellence and Customer Support.

We benefit from more than 40 years of experience developing complex products, optimising manufacturing processes, and ensuring the quality of information systems with leading organisations.

Leveraging our deep sector knowledge and wide-ranging expertise in fields including AI engineering, digitalisation, hyper-automation, cybersecurity and data science, we help future-proof your business.

As a responsible and diverse organisation, Expleo is committed to doing business with integrity and working towards a more sustainable and secure society.

Expleo boasts an extensive global footprint, powered by 15,000 highly-skilled experts delivering value in 30 countries and generating more than €1 billion in revenue.
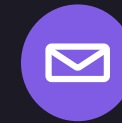
info@expleogroup.com

expleo.com

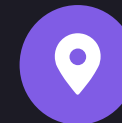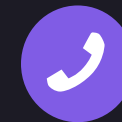Expleo Group

@ExpleoGroup

EXPLEO TECHNOLOGY IRELAND

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Our global footprint – 30 countries

EUROPE

Austria
Belgium
Czech Republic
Finland
France
Germany

Ireland
Italy
Netherlands
Norway
Portugal
Romania

Russia
Spain
Sweden
Switzerland
United Kingdom
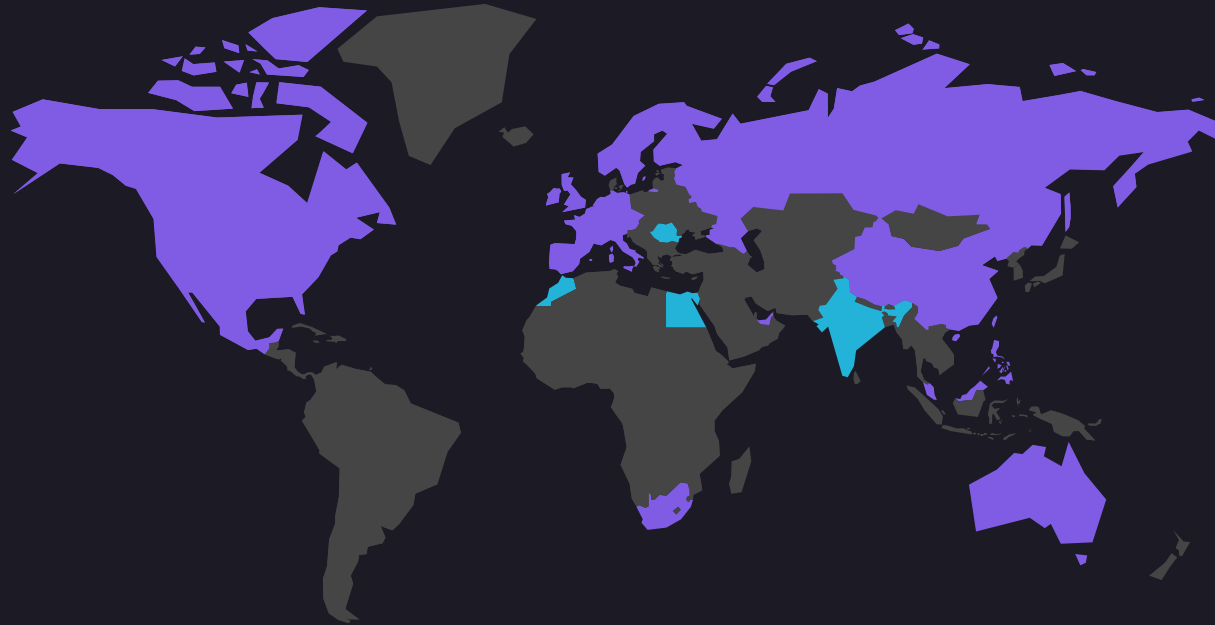
NORTH AMERICA

Canada
Mexico
United States

ASIA

China
India
Malaysia
Philippines
Singapore
UAE

AFRICA

Egypt
Morocco
South Africa

OCEANIA

Australia

10 excellence centres in 4 countries

EGYPT

Cairo

INDIA

Bangalore
Chennai (2)
Coimbatore
Mumbai
Pune

MOROCCO

Tangier

ROMANIA

Bucharest
Iasi