

OVER 800 COMPANIES SURVEYED ACROSS EUROPE

160 companies in the Netherlands report a 7% uplift in revenue from digital investments

that's
\$25B

Moreover, an additional
\$93B

is left on the table if these Dutch companies don't up their digital game

FIVE KEY THEMES EMERGED FROM OUR STUDY

01

EVERY EXECUTIVE IN EUROPE "GETS" THE IMPORTANCE OF NEW DIGITAL TOOLS AND TECHNOLOGIES. THEY EQUAL REVENUE.



Potential revenue impact of digital across the European region will triple over the next 2 years to 8.4%

02

THE NEW "MACHINE TOOLS" - MACHINE LEARNING, AI, AND DATA - WILL UNLOCK SIGNIFICANT VALUE AHEAD.

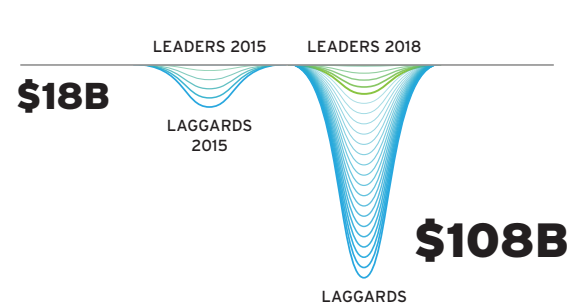


Digital transformations could add up to \$125 million in value over the next 2 years among the surveyed companies in the Netherlands

03

DUTCH COMPANIES BEHIND THE DIGITAL CURVE PAY A LARGE "LAGGARD PENALTY" EVERY YEAR.

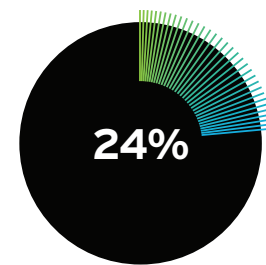
LAGGARD PENALTY:
The difference in cost and revenue performance due to technology



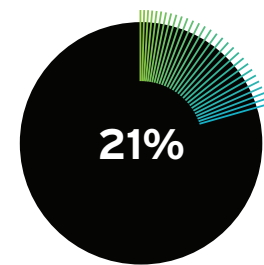
2015's laggard penalty reached \$18 billion among the surveyed companies in the Netherlands. Missing technology's force multiplier on cost and revenue performance sees the laggard penalty climb to \$108 Billion by 2018

04

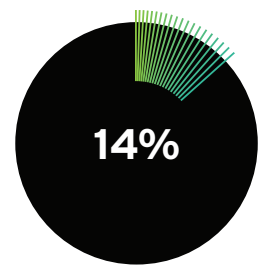
DIGITAL IS ONLY GOING TO INTENSIFY; HIDING UNDER OUR (SECURITY) BLANKETS WON'T KEEP US SAFE FROM CHANGE.



24% of business leaders surveyed across Europe fear data privacy



21% of European respondents face budget constraints and cannot prove the business case anyway

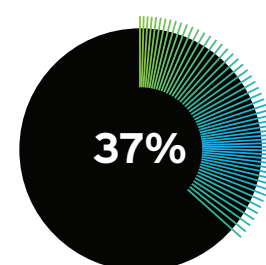


14% report talent gaps preventing them from turning on the digital switch

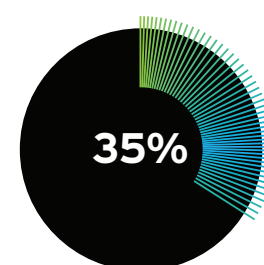
05

STRONG, CONFIDENT LEADERSHIP IS REQUIRED FOR THE WORK AHEAD. FIND THE MONEY, TALENT AND GRIT NEEDED FOR IT!

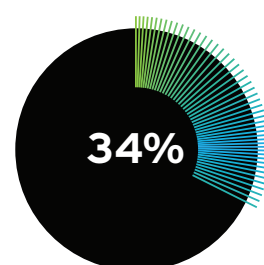
MANAGERS' VIEW OF LEADERSHIP IN EUROPE



37% see a lack of clarity at the top concerning digital



35% express frustration at the speed of change



34% believe the wrong executive leadership is in place to do the work ahead

WHAT DO WE NEED FOR THE WORK AHEAD?



GENERATE YOUR OWN "DIGITAL DIVIDEND"

Is your company leaving money on the table? Smart leaders are using the savings from process automation, AI, and cloud services to fuel their journey forward.



PRIORITIZE, PRIORITIZE AND THEN PRIORITIZE SOME MORE

Do what it takes to broaden or improve your digital presence. It's essential in the current scenario to bring the physical and the virtual together.



MATCH WORDS WITH DEEDS

If your company isn't looking at analytics, meaning making, AI or platforms then you're risking obsolescence. Find the budget to give your company a fighting chance.



RESET THE DYNAMICS OF POWER AND DECISION MAKING

Are the right people in charge? Command and control structures, long decision cycles, and silo-based mentalities will kill digital. A digital reorganization could be on the cards.



BUILD STRONG LEADERSHIP THROUGHOUT THE ORGANIZATION

The organization needs bold leadership. A comprehensive digital program needs setting out for people to marshal themselves behind.

Find out more at www.cognizant.com/the-work-ahead/europe