



DIGITALISM: THE CHANGING TIDES

Economic Research
BNP Paribas Fortis

March 2018



METHODOLOGIE

- *Two years after the BNP Paribas Fortis Economic Research department conducted its first survey on digital preparedness, whose results were then published in a book entitled 'De Winnaarseconomie'/ 'L'Economie des Gagnants' ('The Winners' Economy'), authored by Chief Economist Koen De Leus, a second survey has recently been carried out. The same criteria were used for this follow-up survey as for the initial investigation, thus enabling conclusions regarding the state of digitalisation in Belgium to be drawn on an annual basis and direct comparisons to be made with the preceding year.*
- *The Economic Research Department carried out the survey in the last quarter of 2017 among a sample of 31 listed Belgian companies active in industrial and service sectors. We divided the survey up into these two categories in order to see whether the reaction function is different depending of the sector a company is in.*
- *The questionnaire sent out to the respondents contained a total of 10 questions formulated in English.*
- *This document presents an overview of the results.*

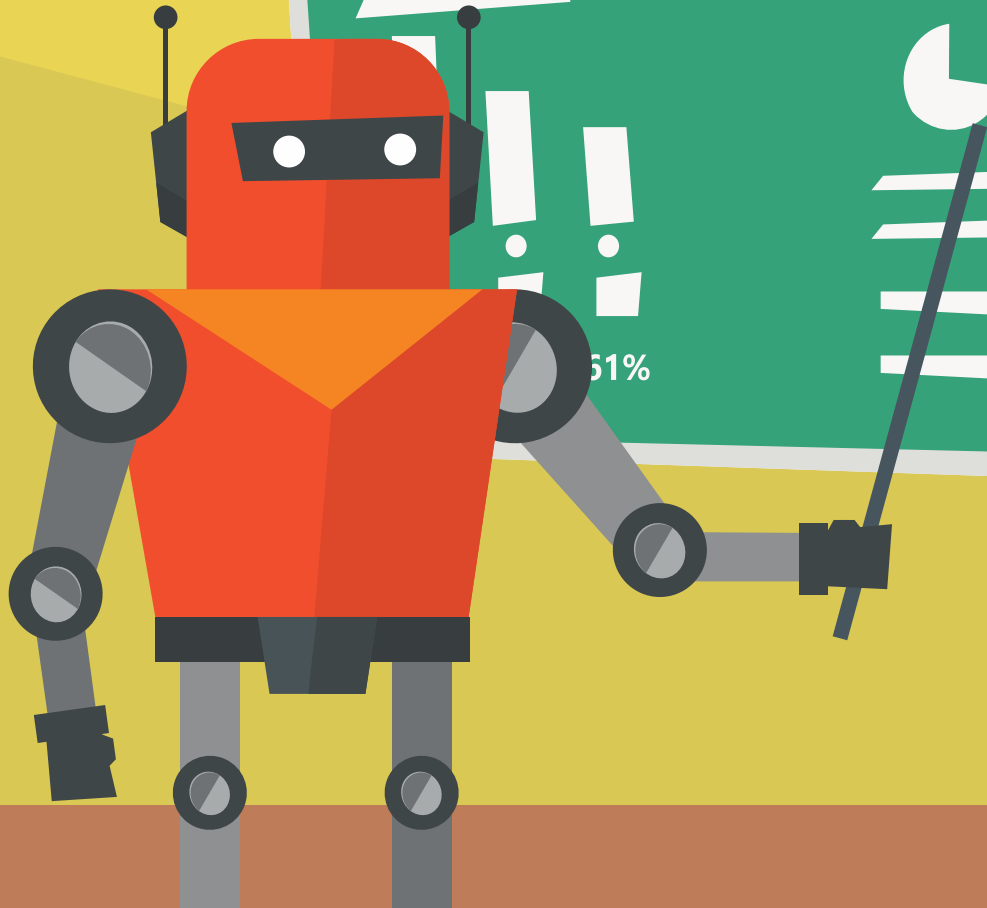


LIST OF COMPANIES WHO ANSWERED THE SURVEY

- 
- A hand in a prosthetic arm is shaking hands with a human hand in a suit sleeve. The background is a solid green color.
1. *Agfa*
 2. *Bekaert*
 3. *EVS*
 4. *Jensen-group*
 5. *Kinopolis*
 6. *Nyrstar*
 7. *Quares (QRF)*
 8. *Van De Velde*
 9. *Befimmo*
 10. *Real Dolmen*
 11. *Resilux*
 12. *Sipef*
 13. *Smartphoto*
 14. *UCB*
 15. *Biocartis*
 16. *Ageas*
 17. *Melexis*
 18. *Lotus bakeries*
 19. *BPOST*
 20. *Telenet*
 21. *Zetes*
 22. *CFE*
 23. *Montea*
 24. *Barco*
 25. *Sioen*
 26. *WDP*
 27. *Terbeke*
 28. *Umicore*
 29. *Dieteren (+ Carglass)*
 30. *Proximus*
 31. *Solvay*

LIST OF QUESTIONS

- 1. Are you prepared for the digital revolution?*
- 2. Are your customers/suppliers prepared for the digitale revolution?*
- 3. Is integrating technologies generating a profit or pushing up costs for you?*
- 4. Will digitalisation and automation lead to (additional) restructuration and job losses?*
- 5. What is your company's approach to life-long learning?*
- 6. How did your investment budget for IT-projects evolve since 2015?*
- 7. How did your population of employees with IT-degrees evolve since 2015?*
- 8. How will your investment budget for IT-projects have evolved by 2019?*
- 9. How will your population of employees with IT-degrees have evolved by 2019?*
- 10. Do you think the New Digital Economy requires a rethink of competition policy?*



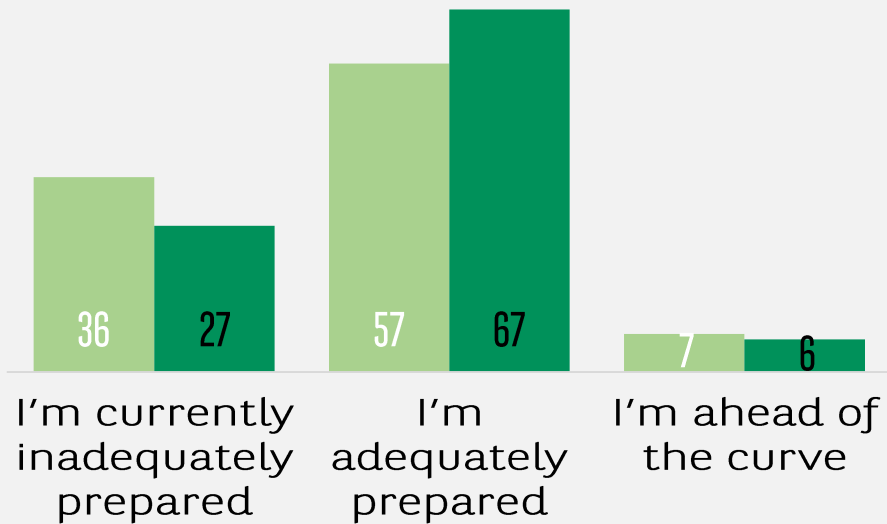
RESULTS
OF
SURVEY



DIGITALISM: THE CHANGING TIDES

1. THE DIGITAL REVOLUTION IS UNDERWAY

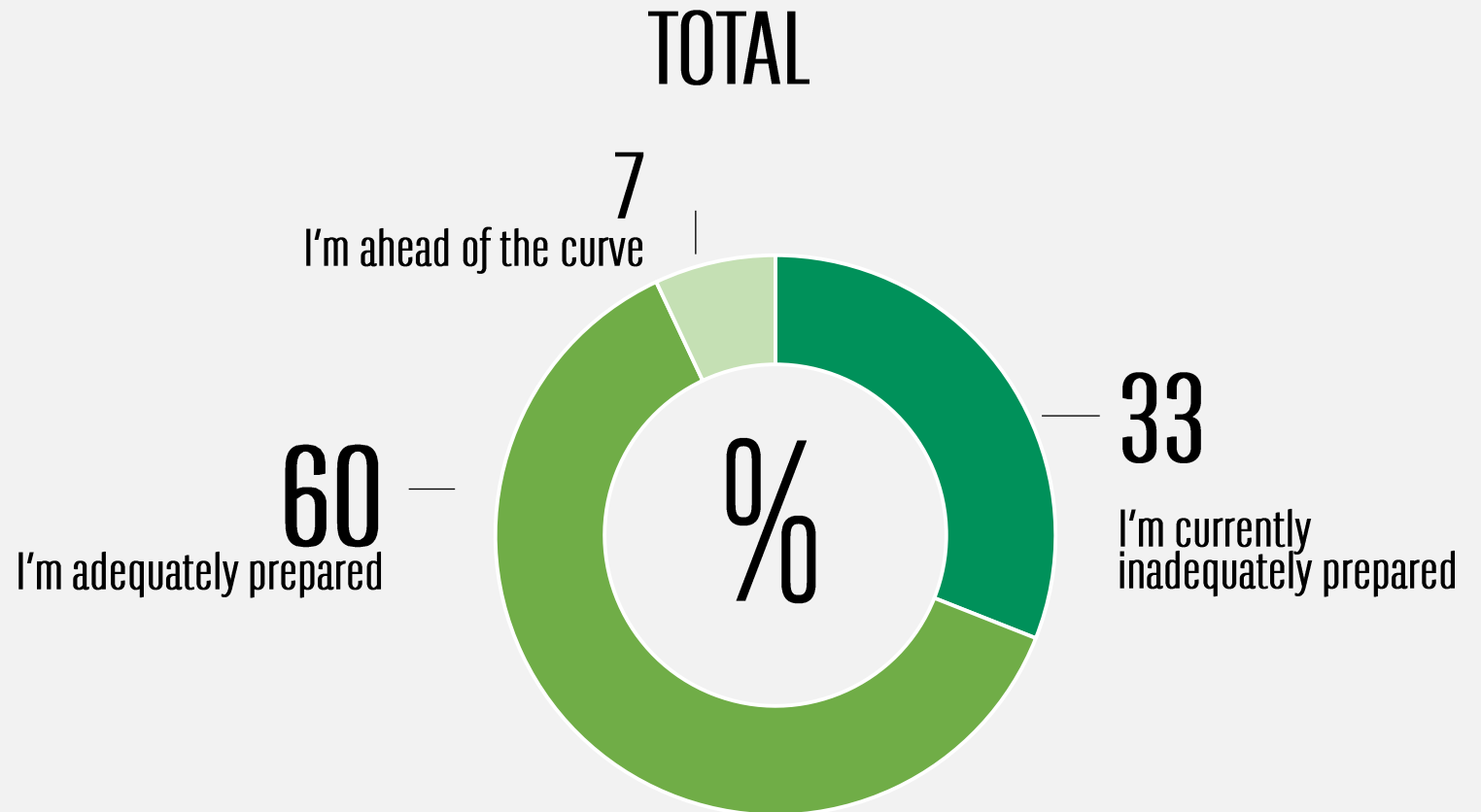
HOW WOULD YOU ASSESS YOUR PRESENT SITUATION?



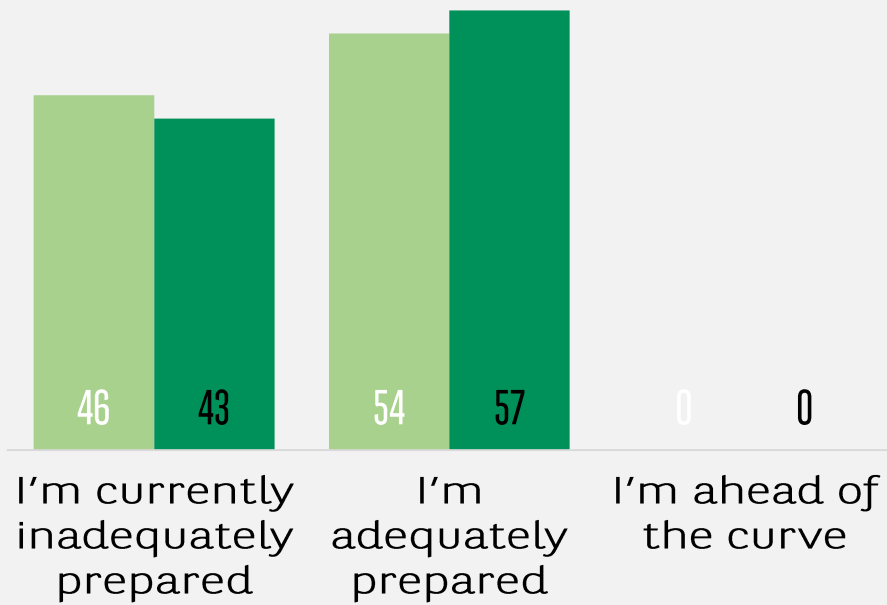
Industry



Service



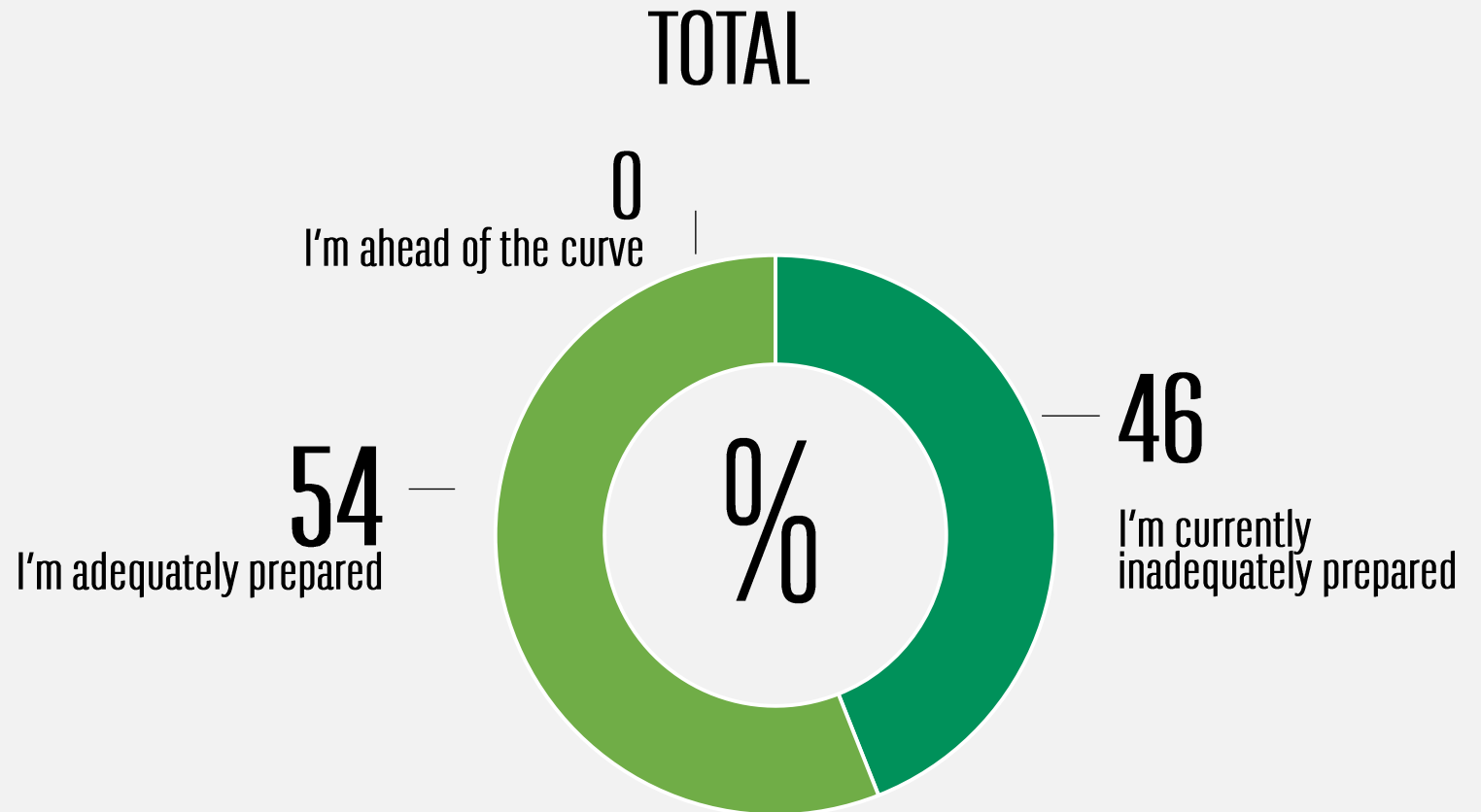
2. THE CUSTOMERS AND SUPPLIERS WITH WHOM YOU WORK WITH ARE



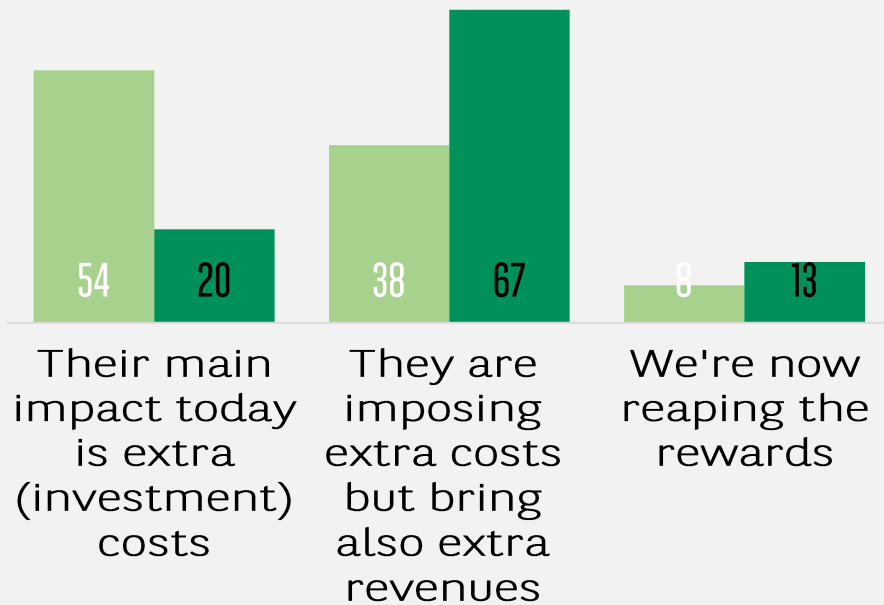
Industry



Service



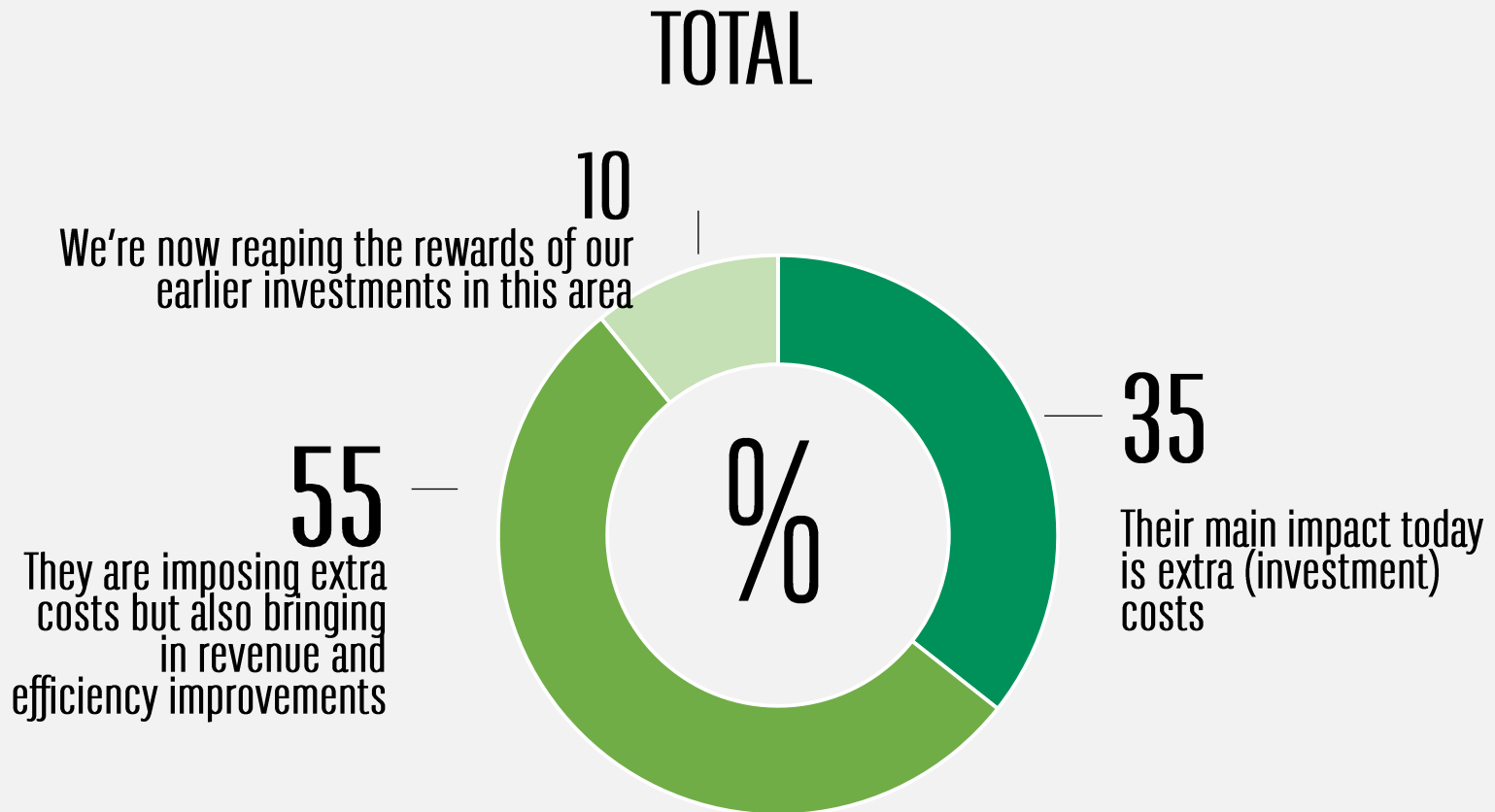
3. REGARDING THE INTEGRATION OF NEW TECHNOLOGIES SUCH AS AI, BIG DATA, IOT, ...



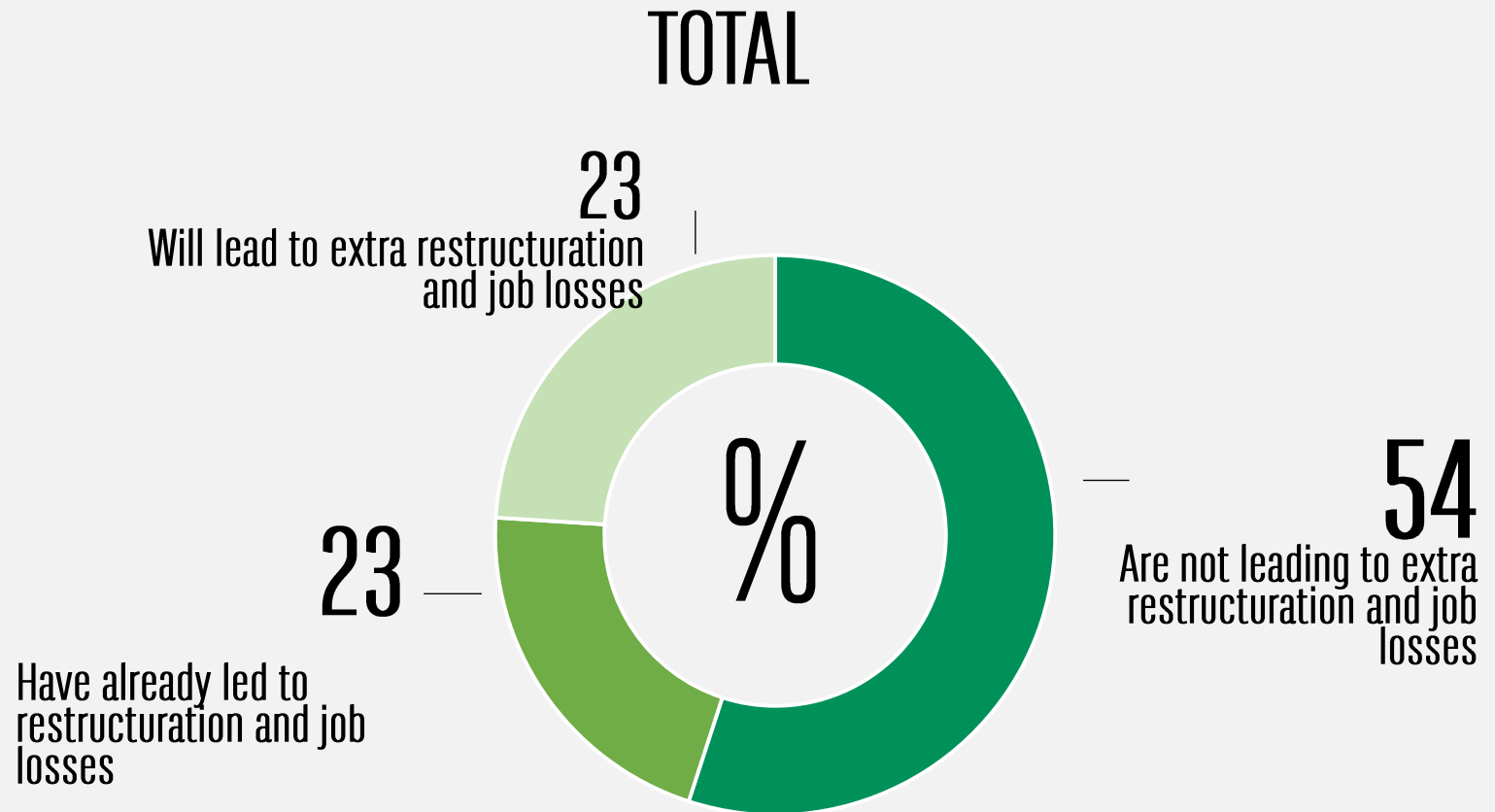
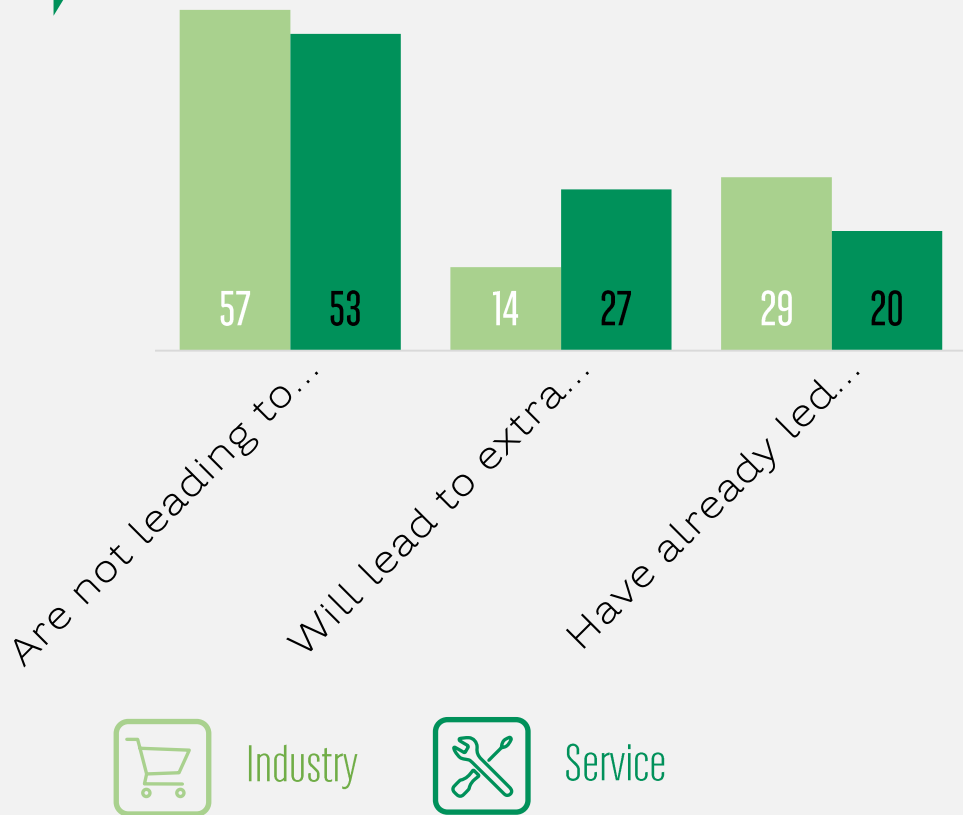
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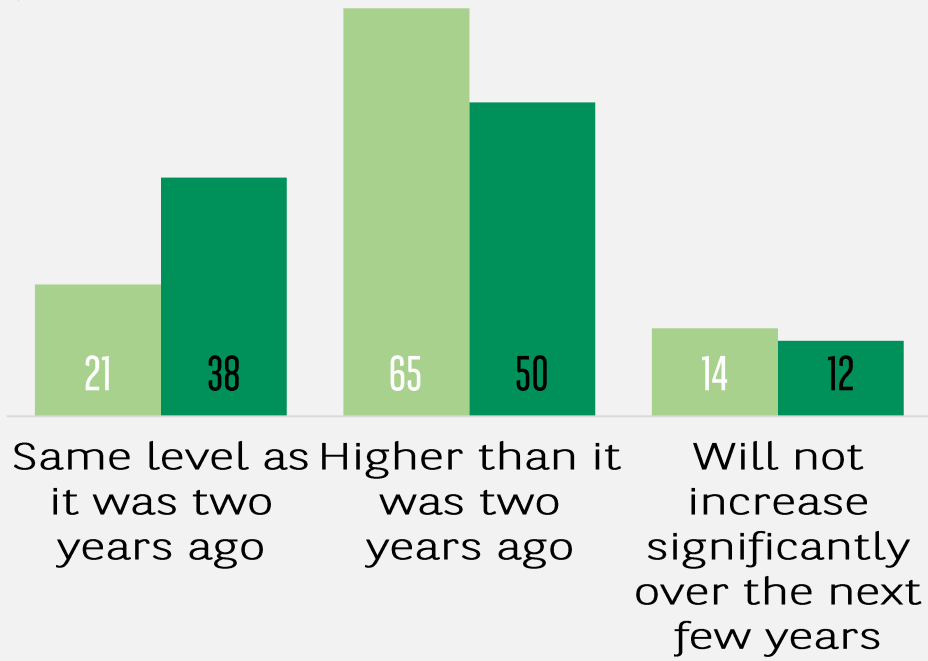
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4. DIGITALISATION AND AUTOMATION



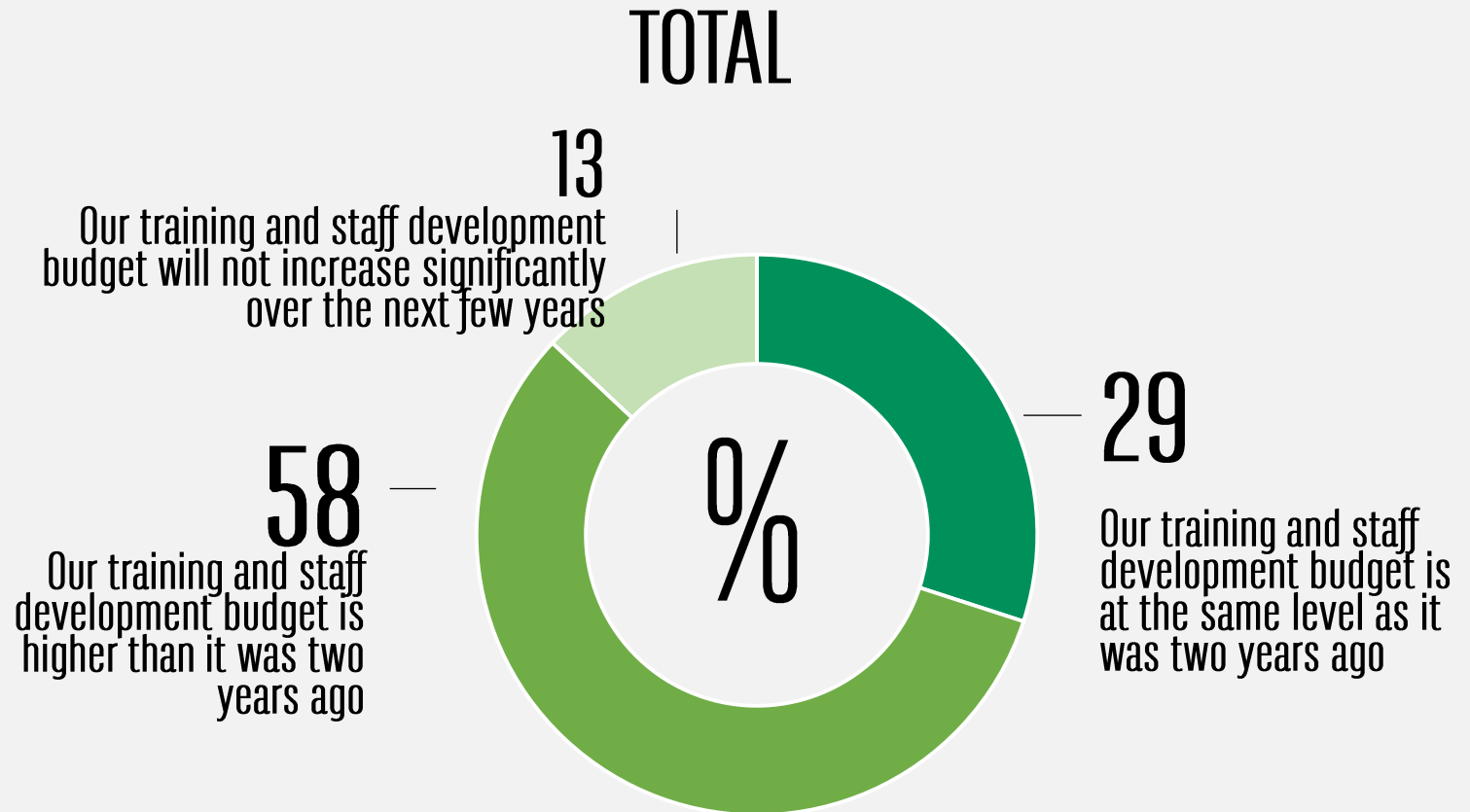
5. WHAT IS YOUR COMPANY'S APPROACH WRT LIFE-LONG LEARNING?



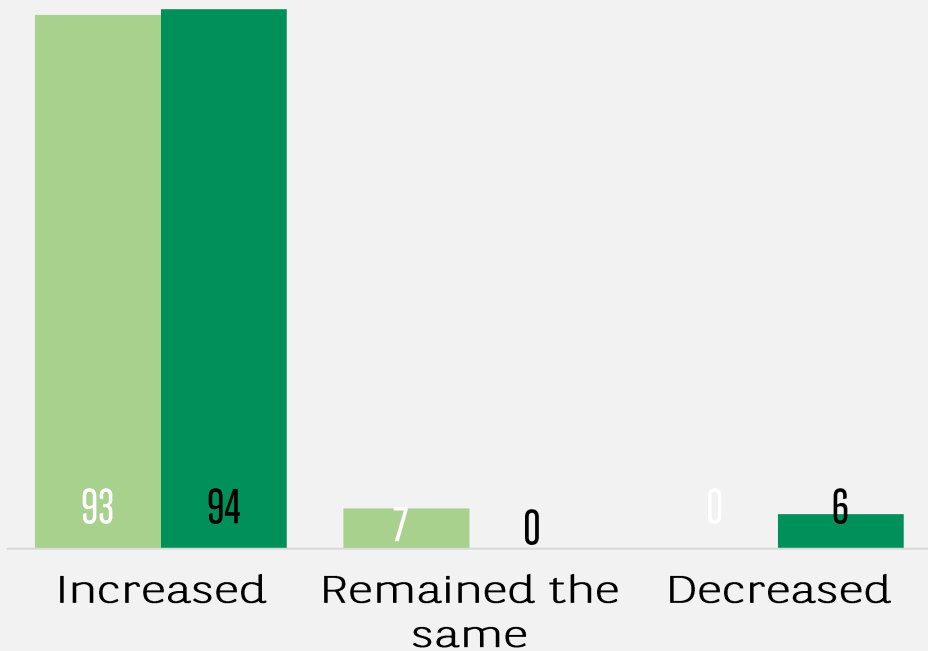
Industry



Service



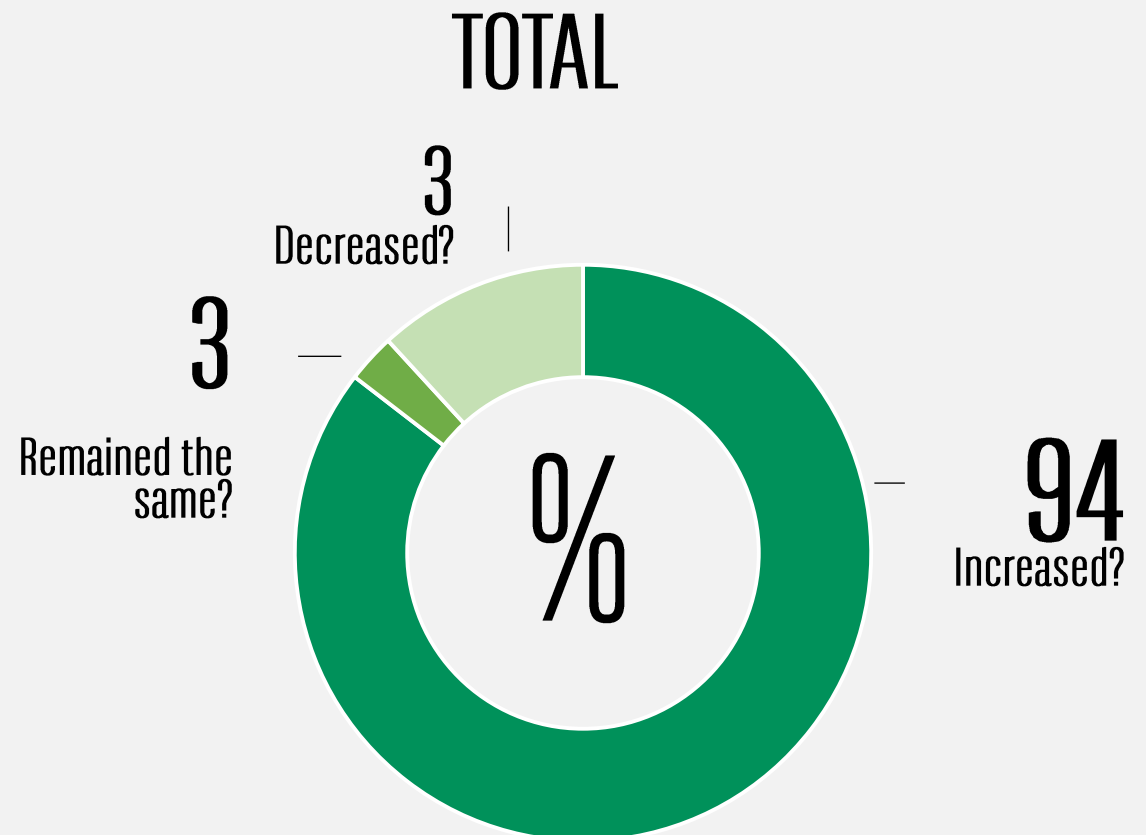
6. IN THE LAST TWO YEARS HAS YOUR IT PROJECT INVESTMENT BUDGET:



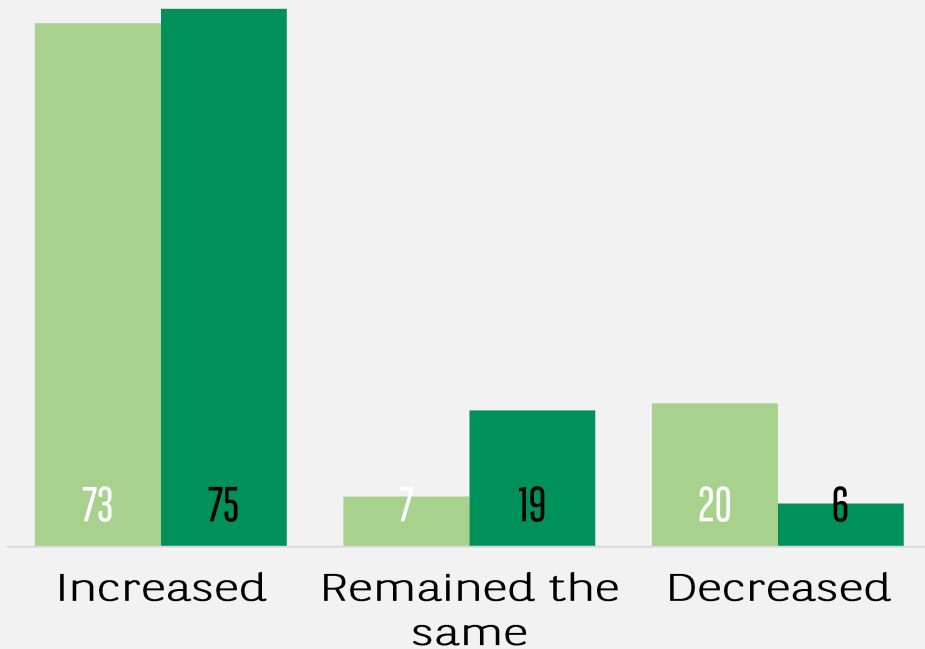
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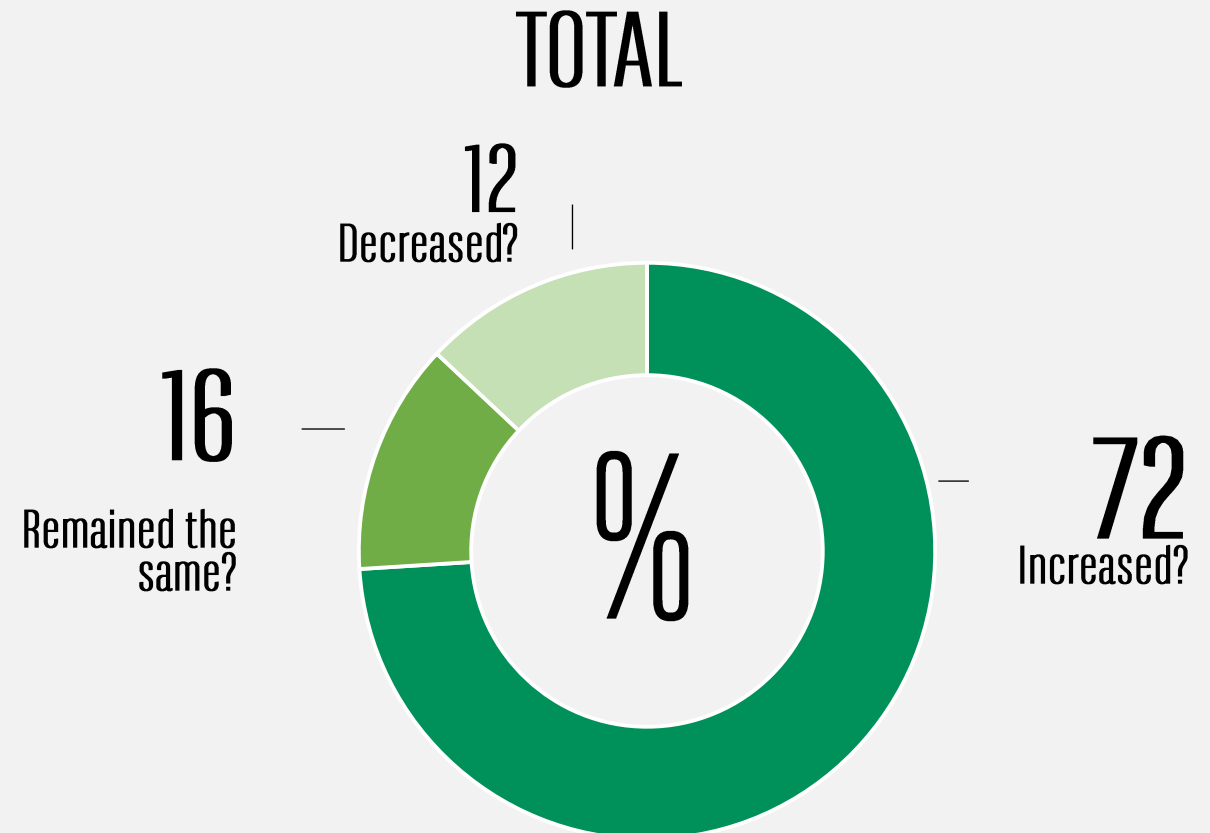
7. IN THE LAST TWO YEARS HAS THE NUMBER OF EMPLOYEES AT YOUR COMPANY WITH AN IT QUALIFICATION...



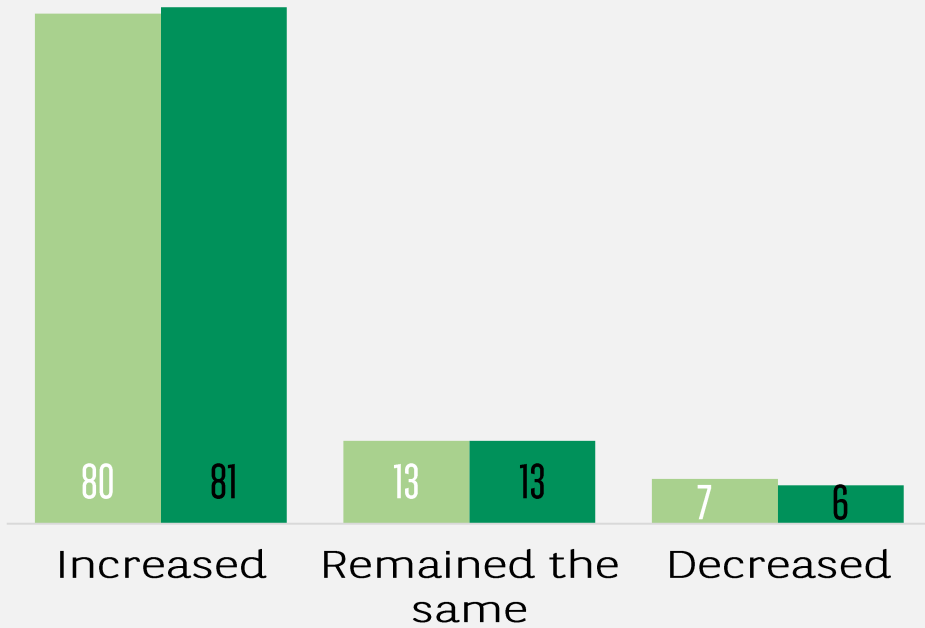
Industry



Service



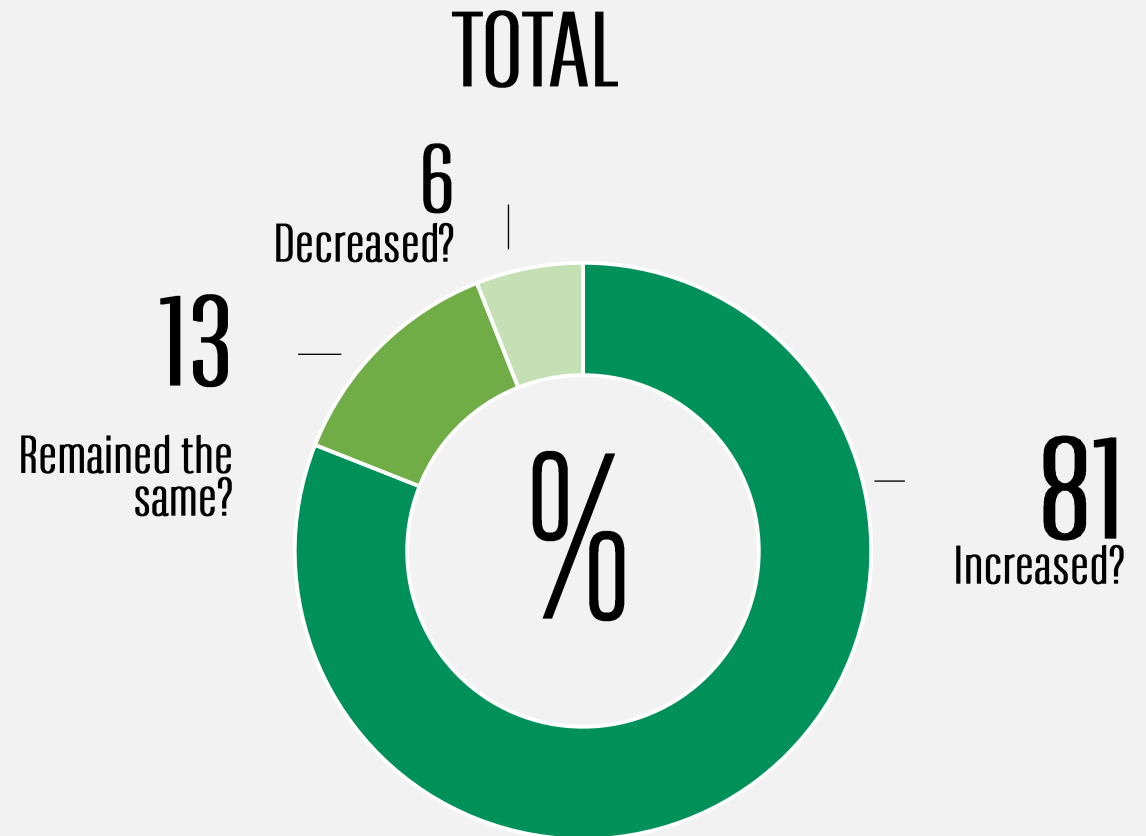
8. DURING THE NEXT TWO YEARS DO YOU EXPECT THE IT PROJECT INVESTMENT BUDGET AT YOUR COMPANY TO...



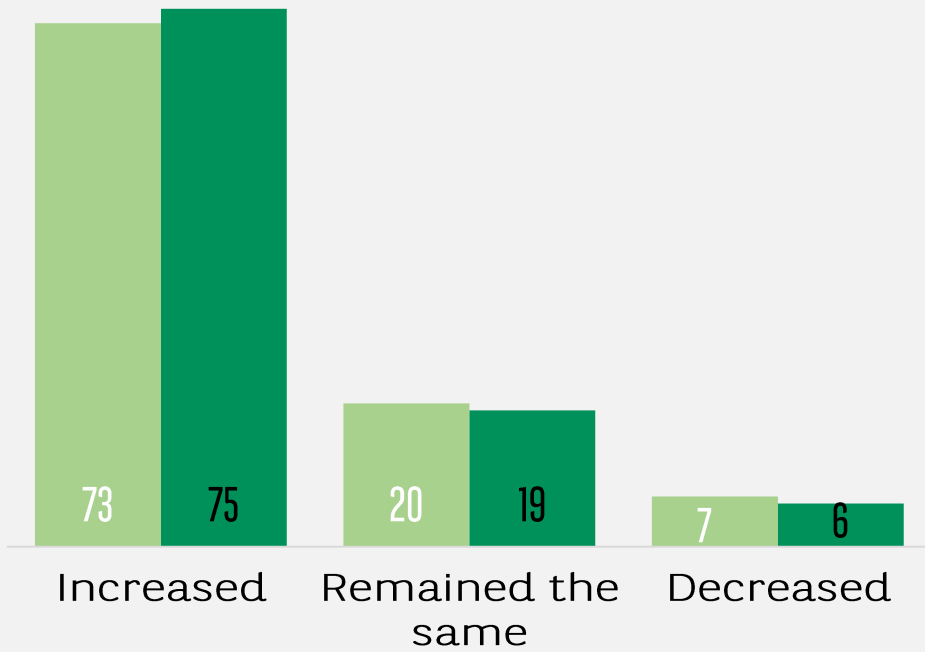
Industry



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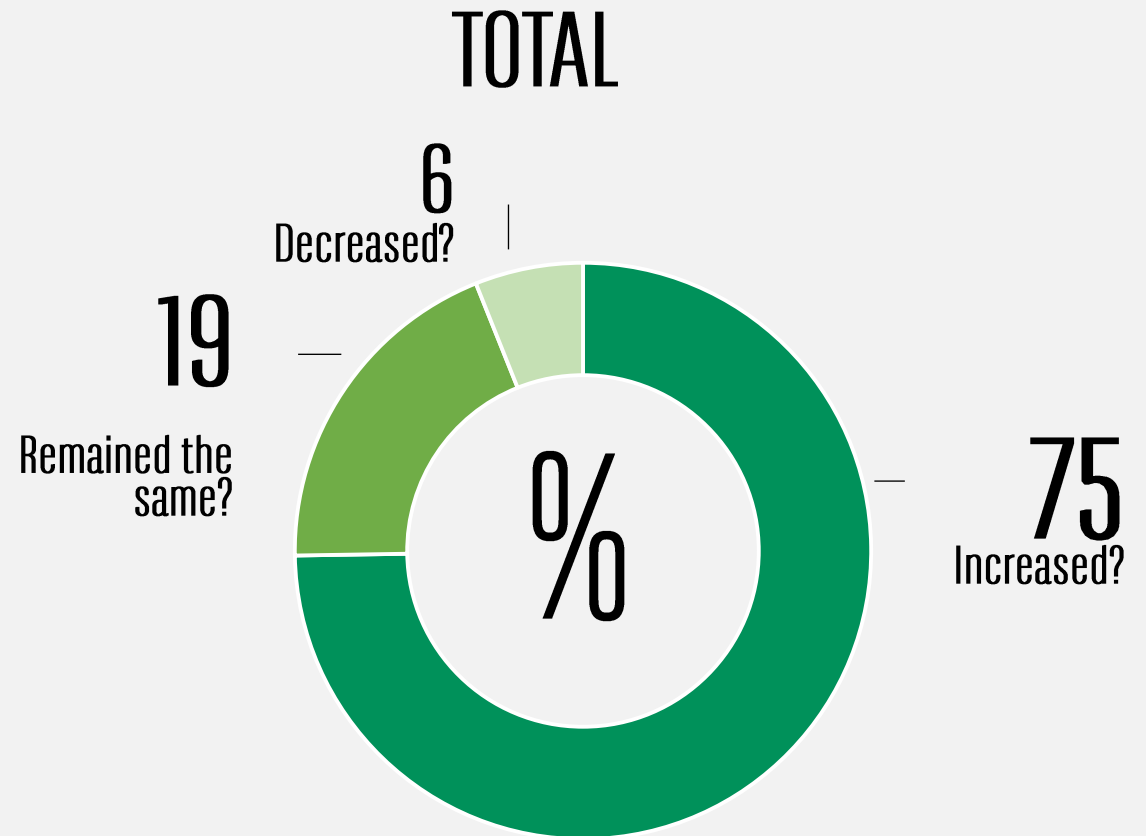
9. DURING THE NEXT TWO YEARS DO YOU EXPECT THE NUMBER OF EMPLOYEES AT YOUR COMPANY WITH AN IT QUALIFICATION TO...



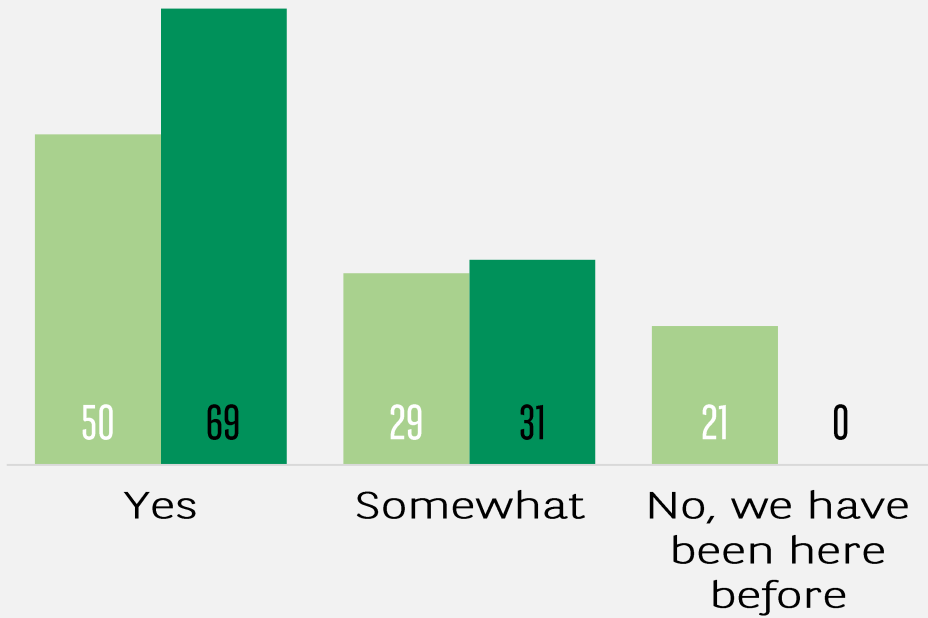
Industry



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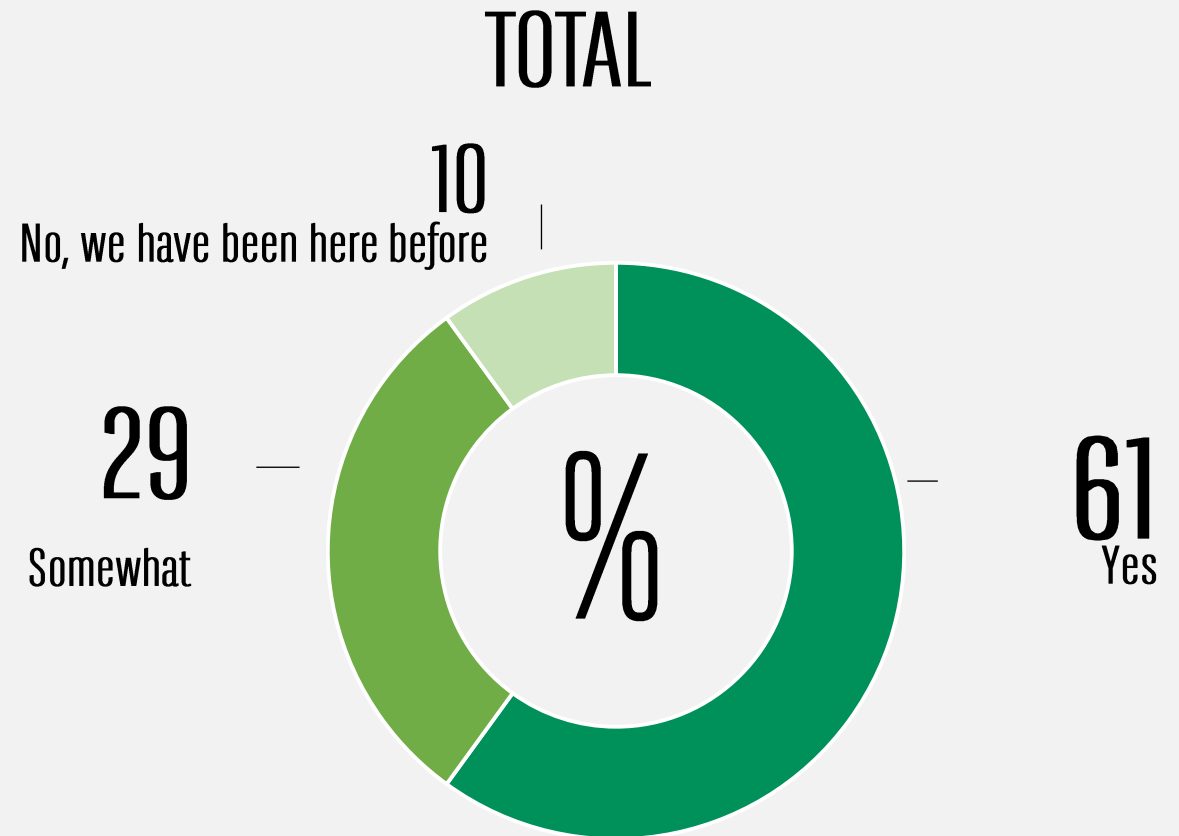
10. DO YOU THINK THE NEW DIGITAL ECONOMY REQUIRES A RETHINK OF COMPETITION POLICY?



Industry



Service



MORE INFO

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