

Digital Masters 2020 RadarView™

COVID-19 pushes digital
transformation, from optional
to mandatory – Report Excerpt

June 2020

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Changing expectations of enterprise stakeholders are leading to new challenges

The impact of COVID-19 has increased the challenges for enterprises and created newer drivers for change.

Key drivers of change	Pre-COVID-19 state	Current and Post COVID-19 state
Customer Behavior 	<ul style="list-style-type: none"> • Gradual shift from physical to digital • Increase in consumer spending • Rising demand for information transparency 	<ul style="list-style-type: none"> • Rapid migration to digital and low human-touch solutions • Value-conscious spending • Information transparency indispensable
Competition 	<ul style="list-style-type: none"> • Digital largely restricted to front-end • Front-end digital focus on access (website, applications) • Customer-centricity as a differentiator 	<ul style="list-style-type: none"> • Need for fully-digital set-up and seamless front-end and backend integration • Front-end designed for experience • Customer-centricity becoming new normal
Workforce Transformation 	<ul style="list-style-type: none"> • Mandate for in-person interactions • Physical workplace • No formal policy for management of contagious diseases at workplace 	<ul style="list-style-type: none"> • Acceptance of remote working • Creation of borderless digital workplace • Increased focus on employee health, wellness, and new workplace policies
Social Transformation 	<ul style="list-style-type: none"> • Explicitly-scoped collaboration between nations for trade and scientific activity • Cross-border movement allowed with necessary documentation 	<ul style="list-style-type: none"> • Extended collaboration between the nations, especially in the European Union • Cross-border movement frozen during COVID-19; expected to be more rigorous on medical status and history

Increasing challenges will kill businesses unprepared for digital transformation, with survivors investing in four areas

Enterprises have been forced to make new investments due to COVID-19. Those that were digitally immature and slow to respond to the changing requirements for business continuity are facing an existential threat.

Unified Communications and Remote Working Platforms

Incorporated in digital workplace adoption strategies



Strategic Vendor Relationships

Forming new or restructuring vendor relationships that can work remotely and without an onsite requirement



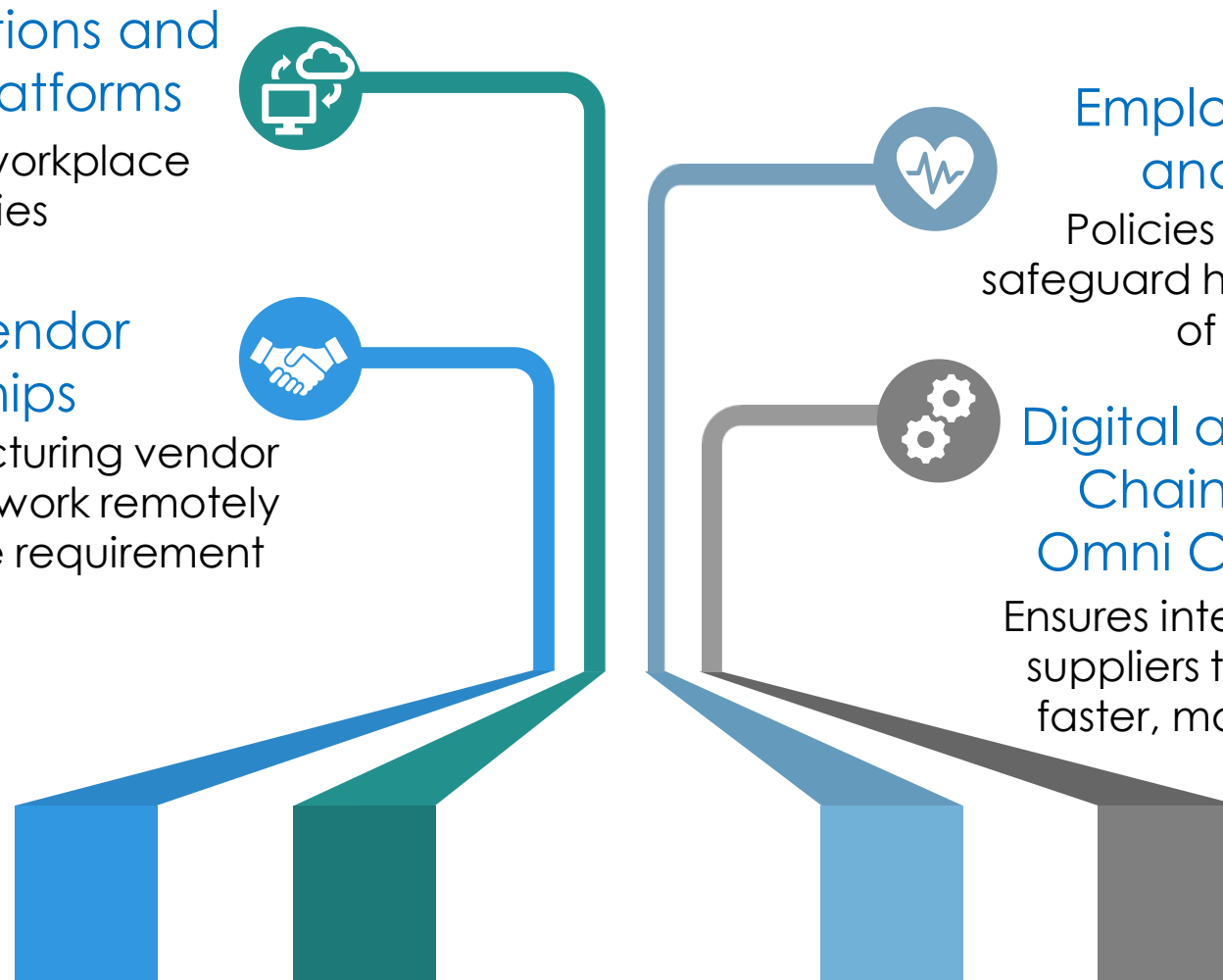
Employee Health and Culture

Policies and measures to safeguard health and well-being of employees



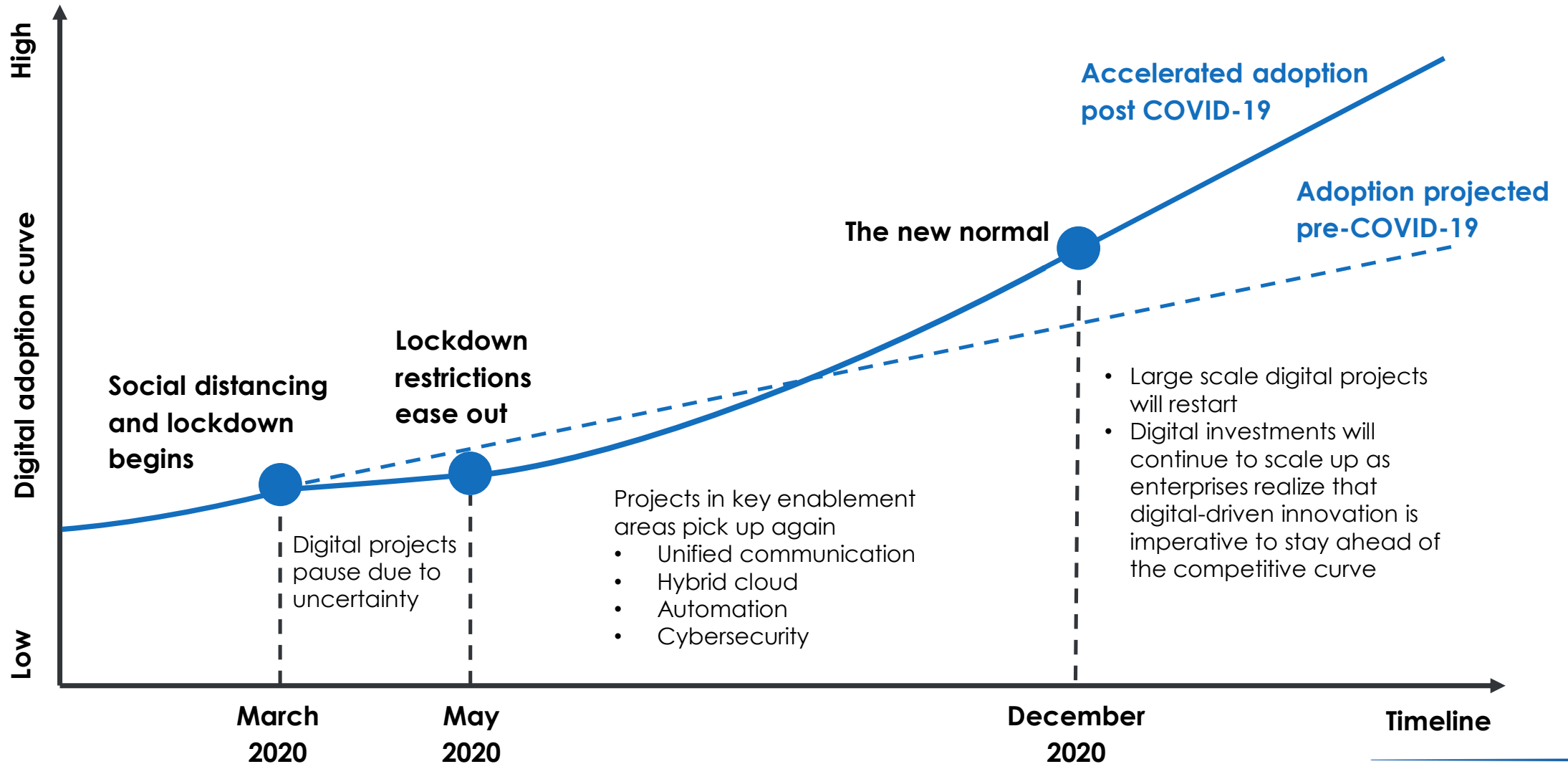
Digital and Global Supply Chains Supported by Omni Channel Platforms

Ensures integrated operations from suppliers to customers which are faster, more granular and more efficient



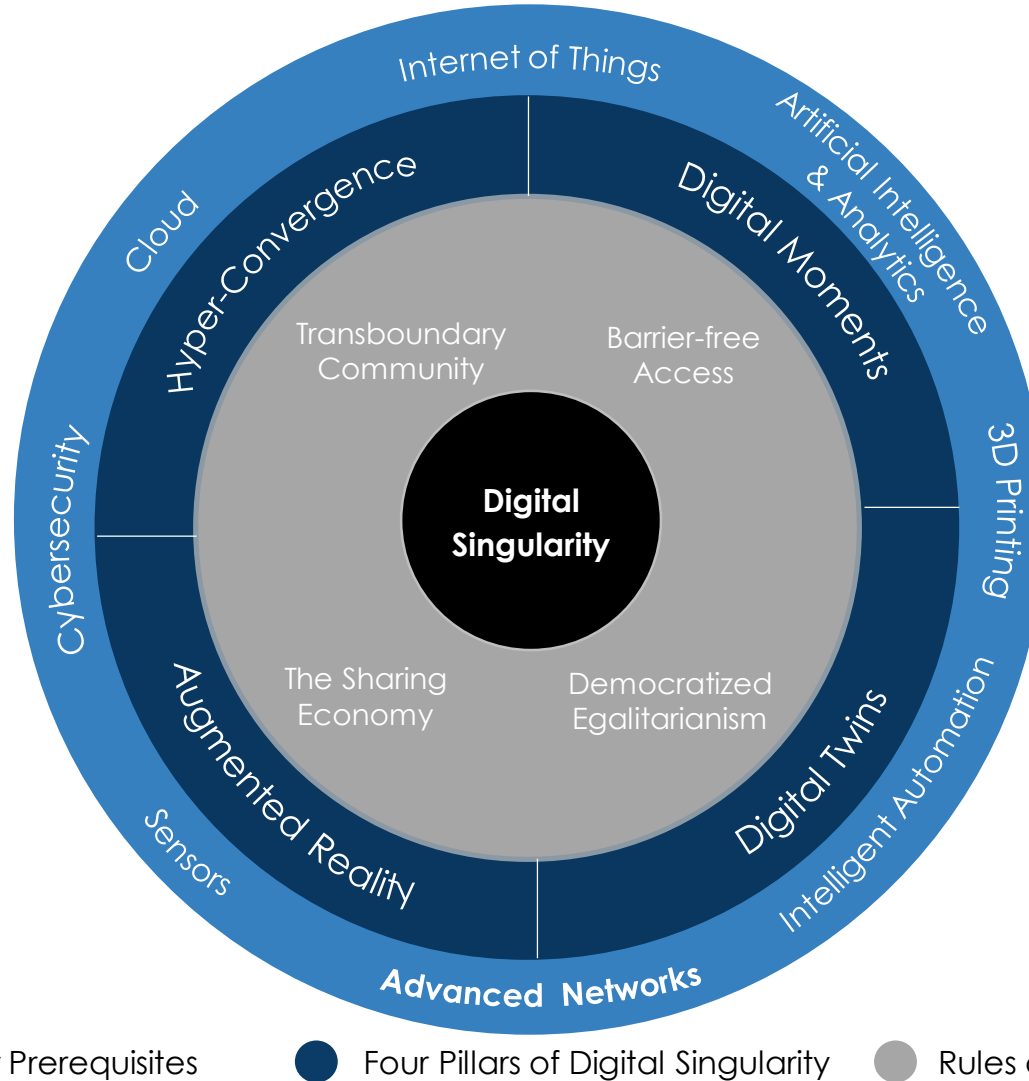
Digital investments will accelerate as enterprises get ready for the new normal

Enterprises' digital investments will accelerate and will continue to grow in the post-COVID-19 era as they look to fundamentally innovate their business and operational models to stay ahead of an intense competitive scenario.



COVID-19 is driving investments towards an expanded set of technology prerequisites

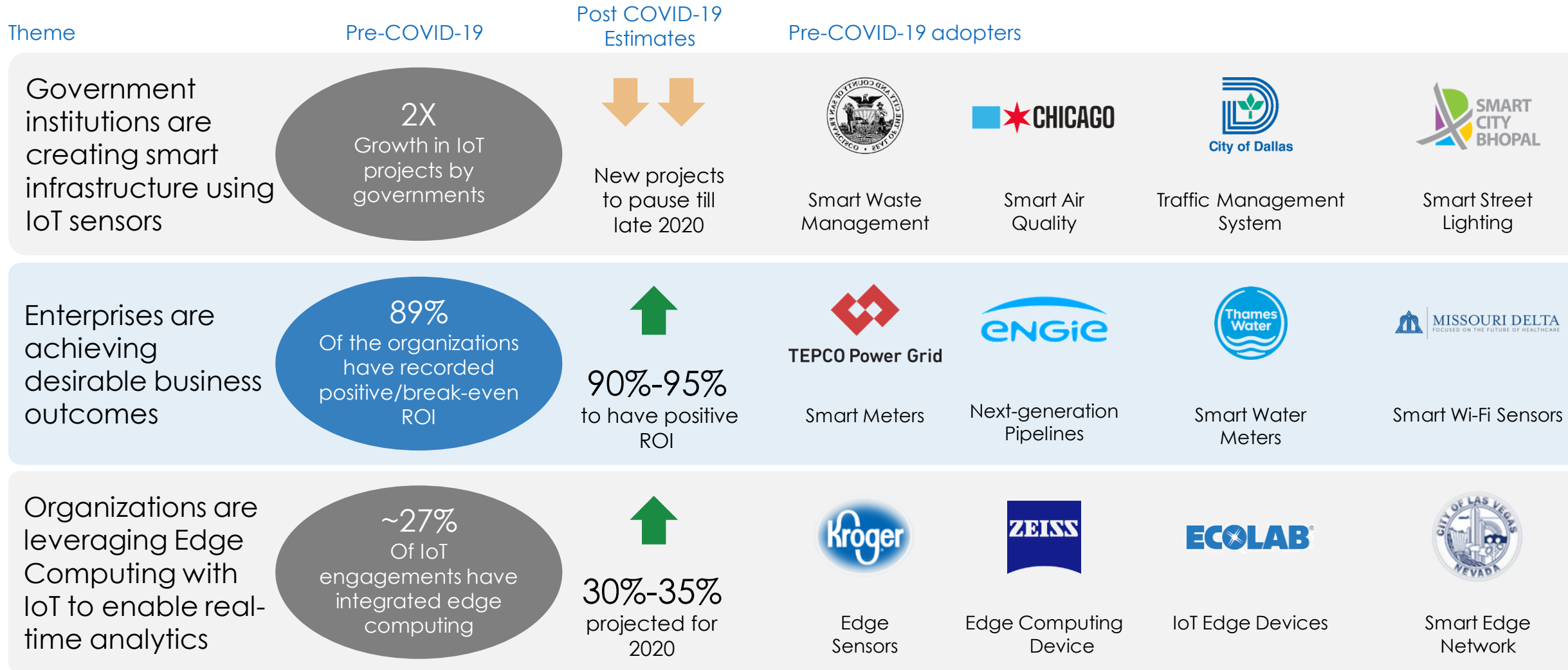
Technology prerequisites for digital maturity have changed from pre-COVID-19 times to include Advanced Networks in the post-COVID-19 era.



● Technology Prerequisites ● Four Pillars of Digital Singularity ● Rules of the New Economy






IoT adoption will increase low-touch and real-time data access in private sector

The Government sector is under enormous financial constraints leading to delay of IoT projects in the short term.



Enterprises across all industries will initiate tactical and strategic digital projects to increase their digital maturity

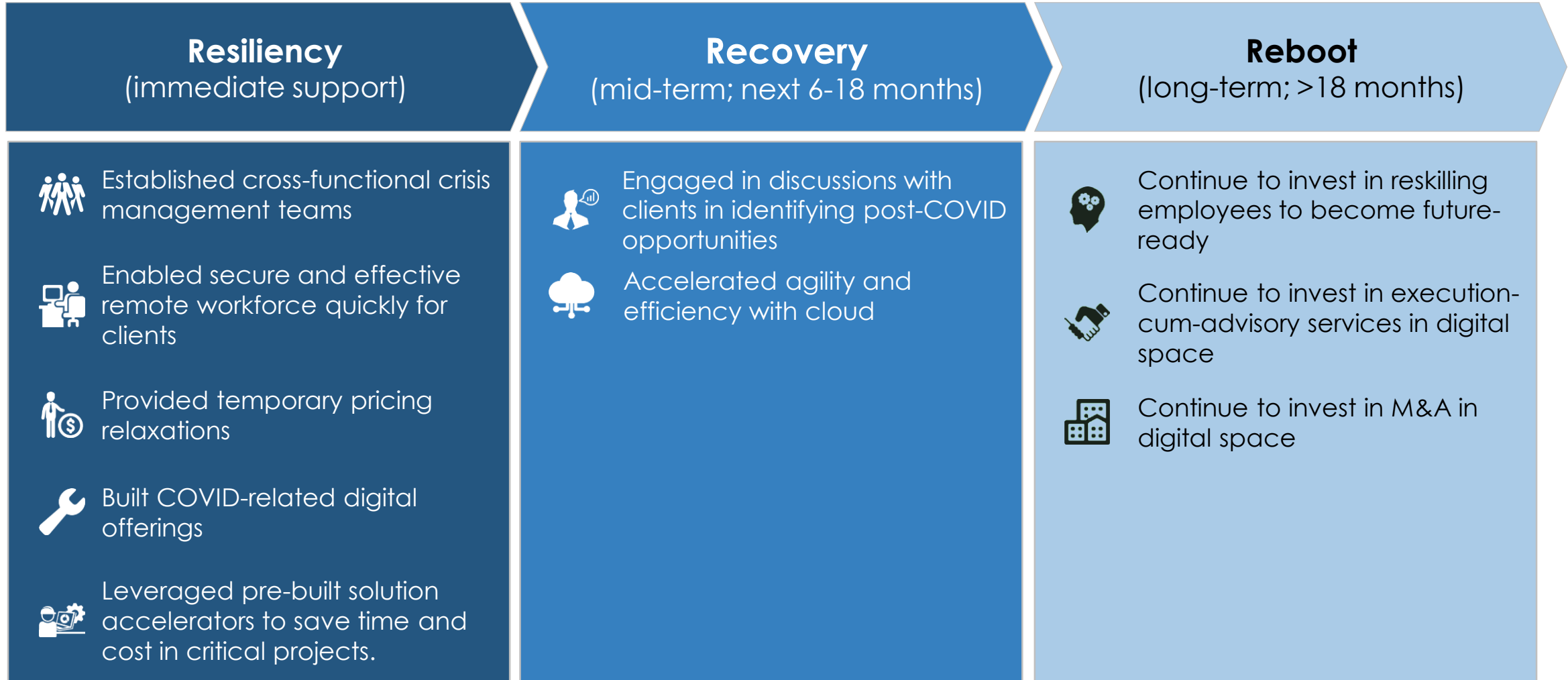
The spread will move upwards as enterprises undertake newer digital projects in the post-COVID-19 era, leading to a change in the competitive landscape. Enterprises will accelerate technology hyperconvergence to differentiate themselves.

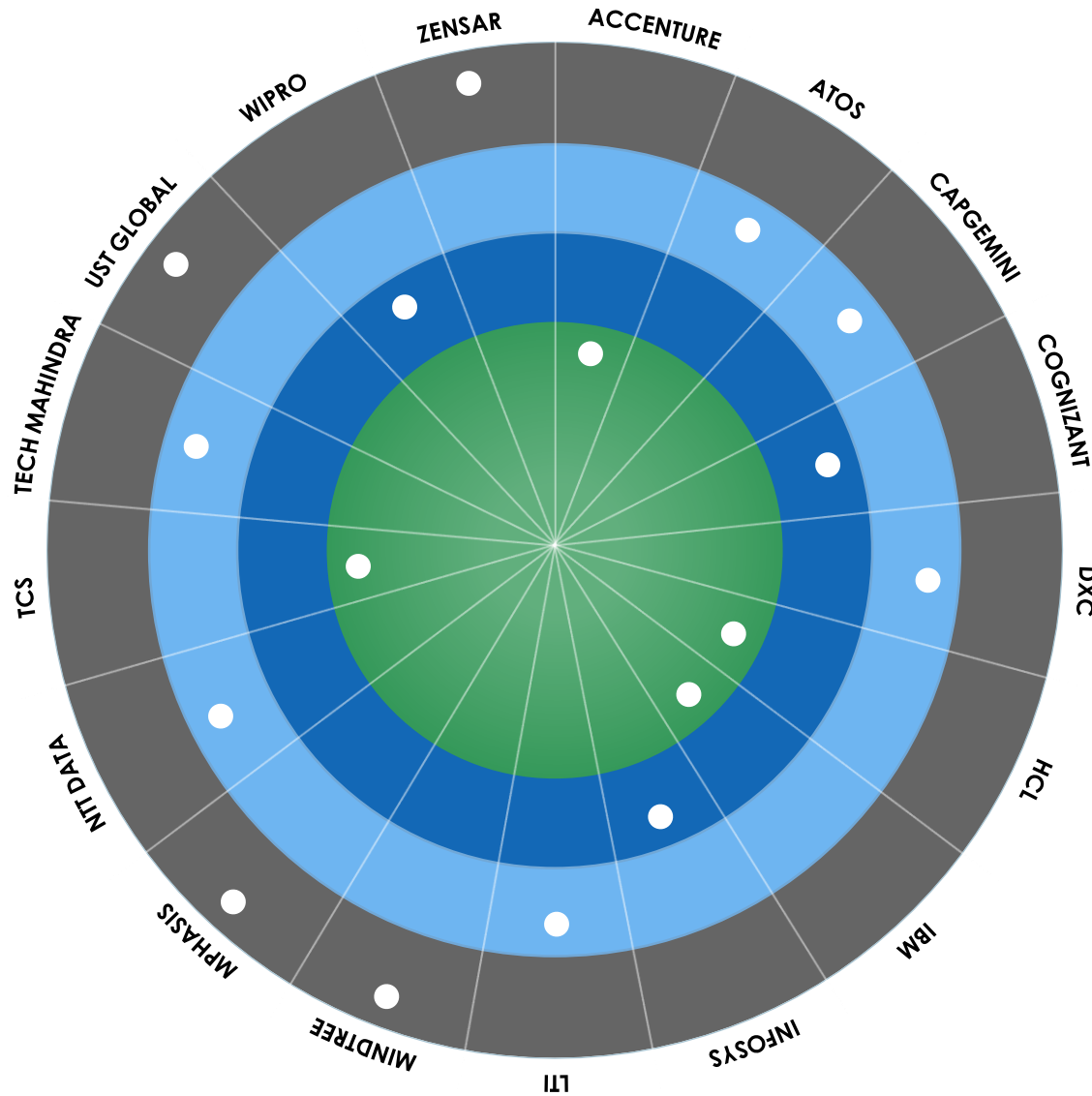
INCREASING DIGITAL MATURITY	Enterprise Digital Maturity	Description	% of enterprises in each category in 2019	→	% of enterprises by the end of 2021
	 Transformer	<ul style="list-style-type: none"> Industry leading transformation Does not follow historical norms Challenges the status quo 	5-10%	→	10-15%
	 Accelerator	<ul style="list-style-type: none"> Supports industry transformation Maintains a customer-obsessed culture Is active in researching new methods and technologies 	25-30%	→	30-35%
	 Striver	<ul style="list-style-type: none"> Analyzes trends and experiments with digitizing business processes Seeks executive support for new resources and technology 	30-35%	→	35-40%
	 Follower	<ul style="list-style-type: none"> Acknowledges the need for digital transformation Drives digital literacy Aims to digitize specific business processes only 	30-35%	→	20-25%
	 Beginner	<ul style="list-style-type: none"> Operates with legacy approach Believes it is business-as-usual to remain relevant to digital 	5-10%	→	0-5%

Despite the business impact, Digital Masters continue to help clients across all phases of COVID disruptions



Digital Masters have helped enterprises in managing disruptions and minimizing the impact. They are also creating solutions to help them recover from the impact in the mid-term and be future-ready in the long term.





LEADERS

Accenture
HCL
IBM
TCS

INNOVATORS

Cognizant
Infosys
Wipro

DISRUPTORS

Atos
Capgemini
DXC
LTI
NTT DATA
Tech Mahindra

CHALLENGERS

Mindtree
UST Global
Mphasis
Zensar

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