

Growth Analysis

Swedish Agency for
Growth Policy Analysis

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Software for Competitiveness

Big Data and Other Frontiers

14 November, 2017

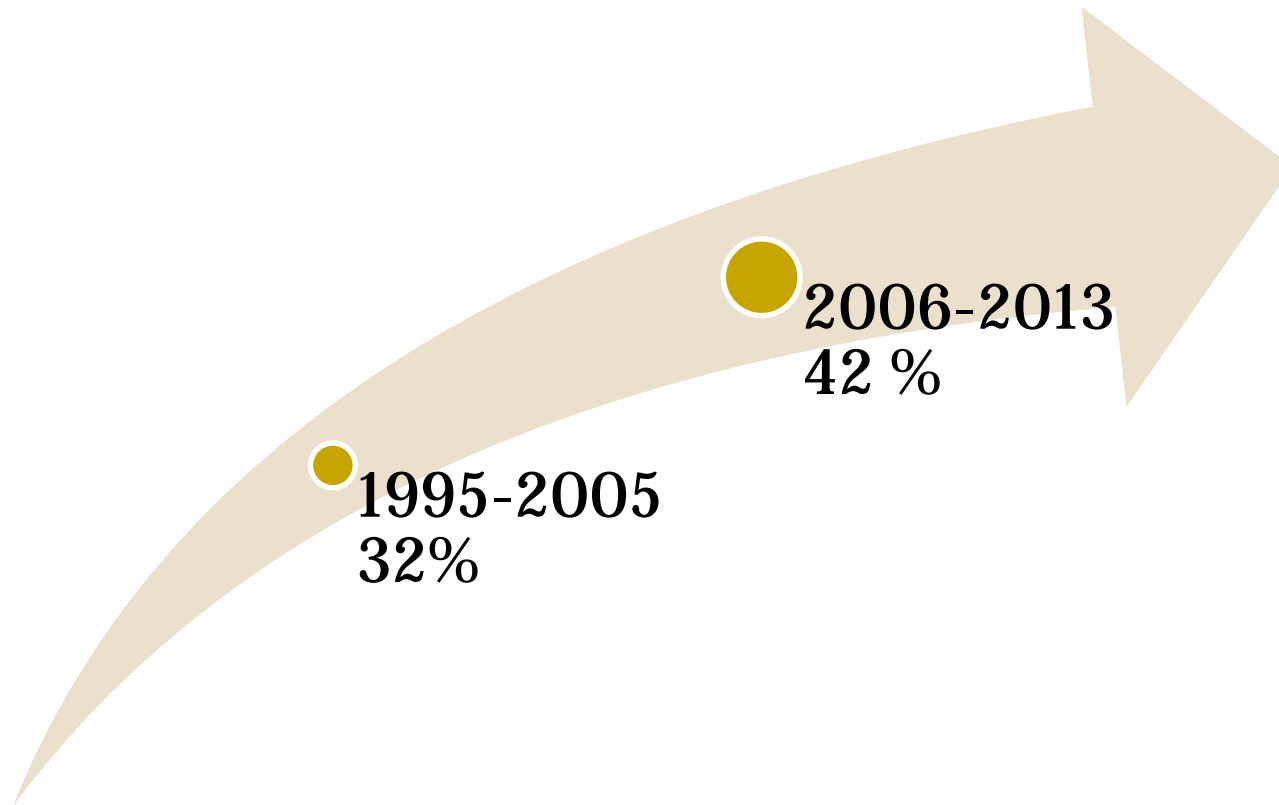
Stockholm



Presentation overview

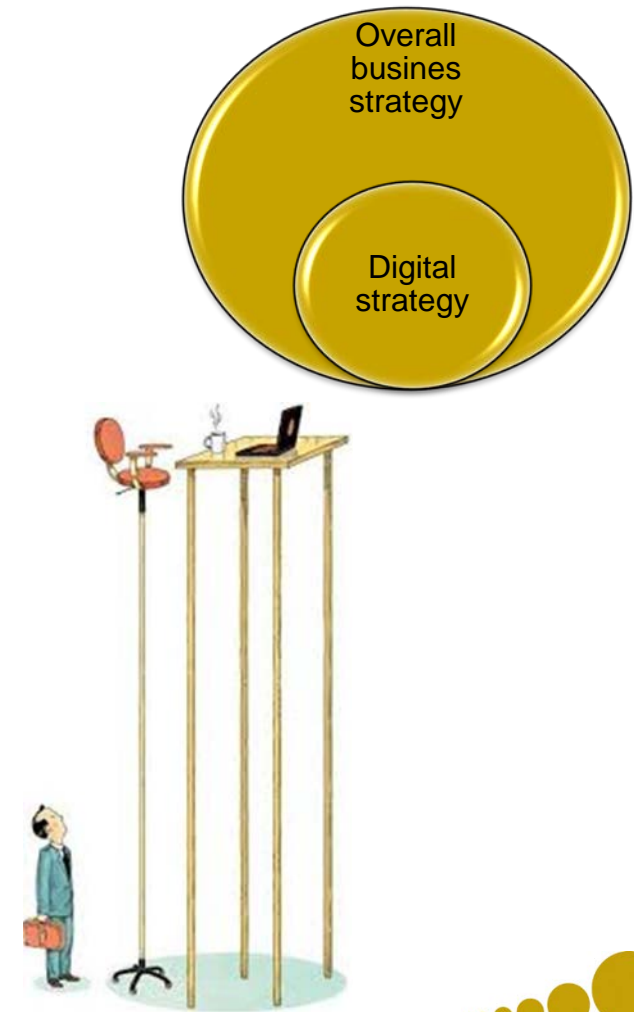
- The ICT drives productivity
- What do we know about digital maturity?
- Model used to analyse digital maturity
- Results
 - Industries
 - Firm sizes
 - Transformation management

The Swedish ICT sector drives productivity



Digital maturity in the literature

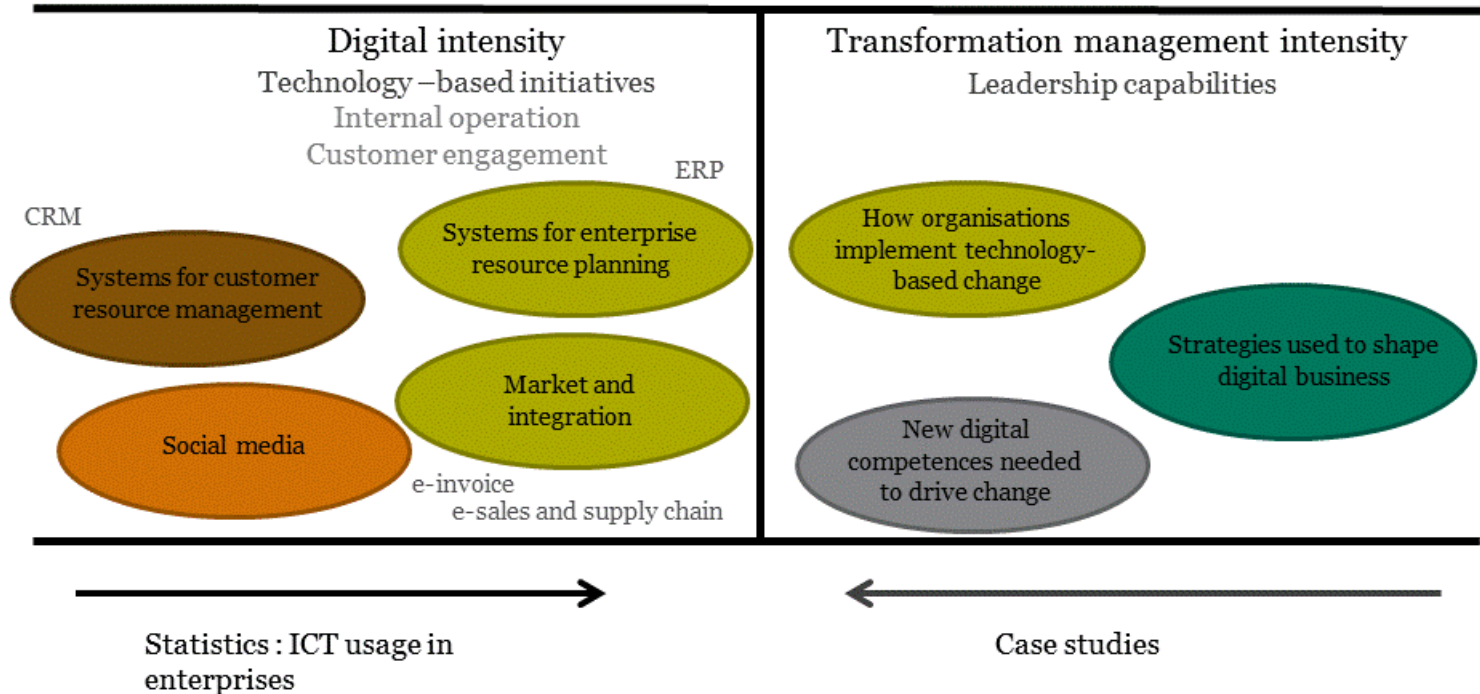
- The biggest difference between high and low digital maturity is not in technology usage aspects but in the business aspects i.e. strategy and skills
- Digital strategies are embedded in the overall business strategy
- Need for different types of digital competence to change how firms operate



Source: Kane, Palmer, Phillips, and Kiron (2015); Bharadwaj et al. (2013) ; Westerman, McAfee, Tannou, Bonnet, and Ferraris (2012) ; OECD, 2016

Modell to analyse digital maturity

The what and how of digital transformation



Industries

	ERP systems	CRM systems	Market & integration	Social media	overall digital maturity
Industry					
Information and communication	0,54	0,52	0,25	0,34	0,34
Wholesale and retail	0,63	0,53	0,32	0,11	0,25
Other services	0,54	0,44	0,17	0,16	0,22
Manufacturing	0,72	0,37	0,23	0,09	0,20
Utilities	0,47	0,35	0,17	0,12	0,19
Accommodation and food services	0,47	0,34	0,24	0,06	0,16
Real estate activities	0,59	0,40	0,11	0,08	0,14
Transport and storage	0,50	0,15	0,28	0,03	0,12
Construction	0,45	0,17	0,14	0,04	0,10
IKT-sector					
IKT-using sectors	0,72	0,55	0,35	0,27	0,37
IKT-sector (int def)	0,68	0,59	0,22	0,21	0,29

More digitalt
mature



Less digital
mature

Sources: Statistics Sweden: ICT usage in Enterprises 2014, Structural Business Statistics 2013, and the registry of enterprise groups 2013. Growth Analysis: International Enterprises 2013. Calculations by Mrs. Widerstedt

Firm sizes

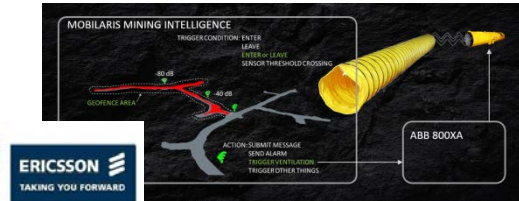
Size	ERP systems	CRM systems	Market & integration	Social media	Overall digital maturity
Small firms	0,43	0,30	0,17	0,16	0,20
Mid-sized firms	0,71	0,51	0,31	0,28	0,35
Large firms	0,90	0,67	0,46	0,40	0,50

More digitally
mature



Less digitally
mature

Transformation management



**Digital
Product/services**



**Digitally
connected
purchase,
production and
sales processes**



**Digital business
model**

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Thank you!

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Knowledge for growth