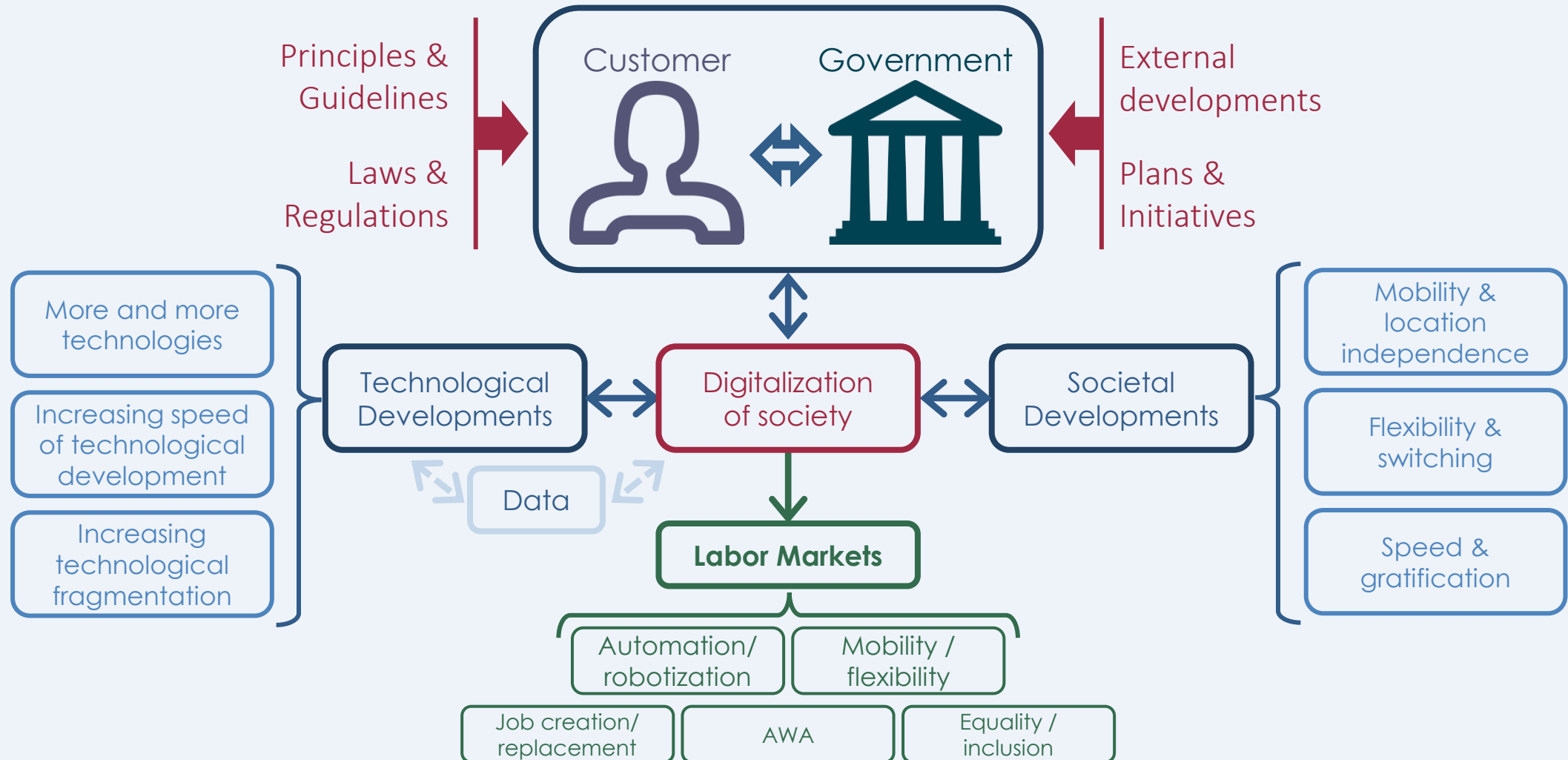


Data and Digital in LAC PES 2022

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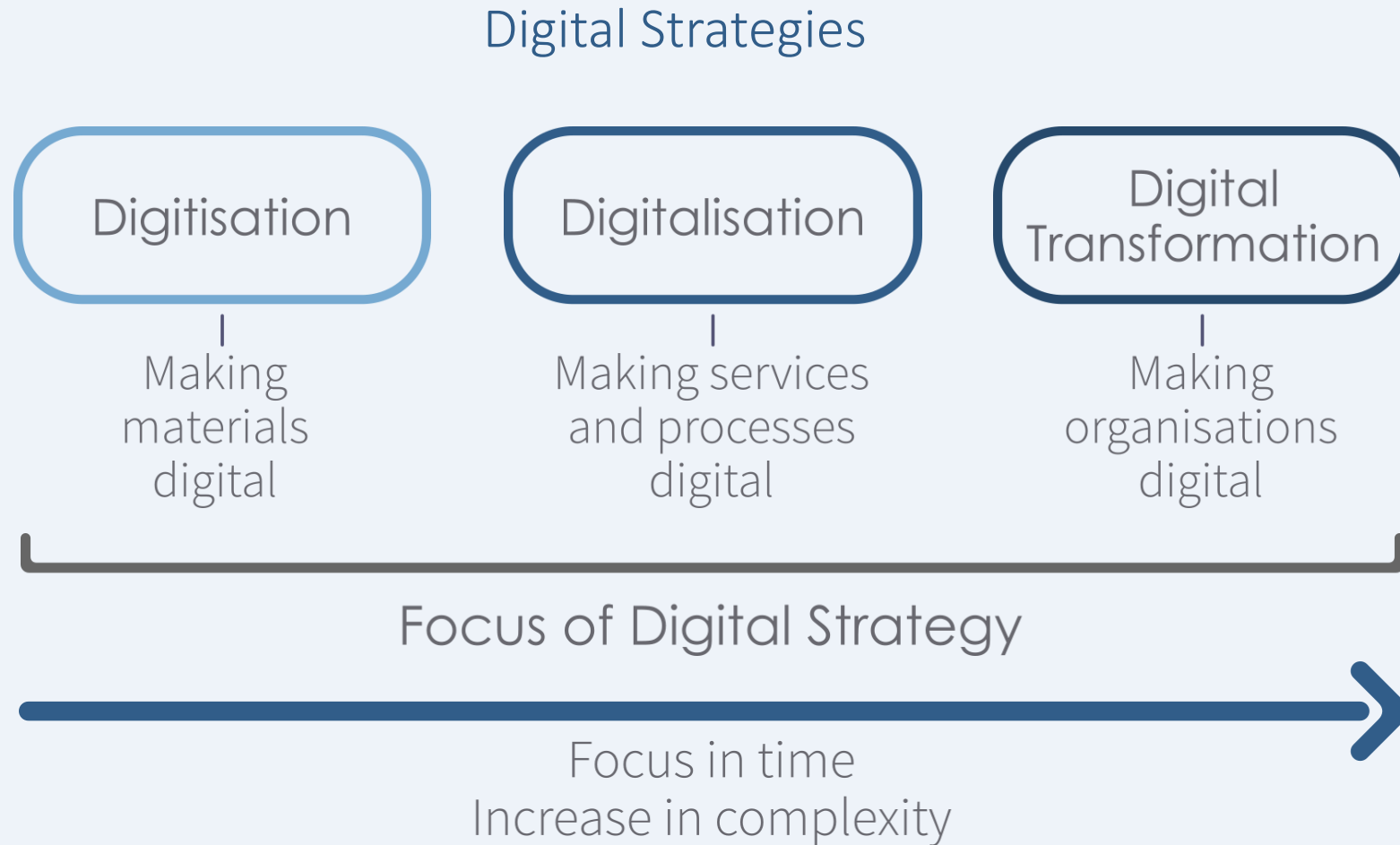
The digital environment

Framework



Towards digital transformation

Types of 'digital'



Towards digital transformation

The essence

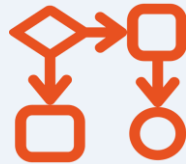
Digital transformation is less about 'digital' but much more about an entire shift in the organization, its mission, vision and strategies. This includes many 'soft' elements, such as leadership, culture, engagement, communication, etc.



Front office



Strategy



Back-office



Organization



Data



Customer

Benchlearning study LAC

Background

Digital transformation in PES

- Use of digital technologies to improve processes and services for jobseekers and employers

Complicated challenge that interacts with societal changes

- Strategy, front-office, back-office, organization, data

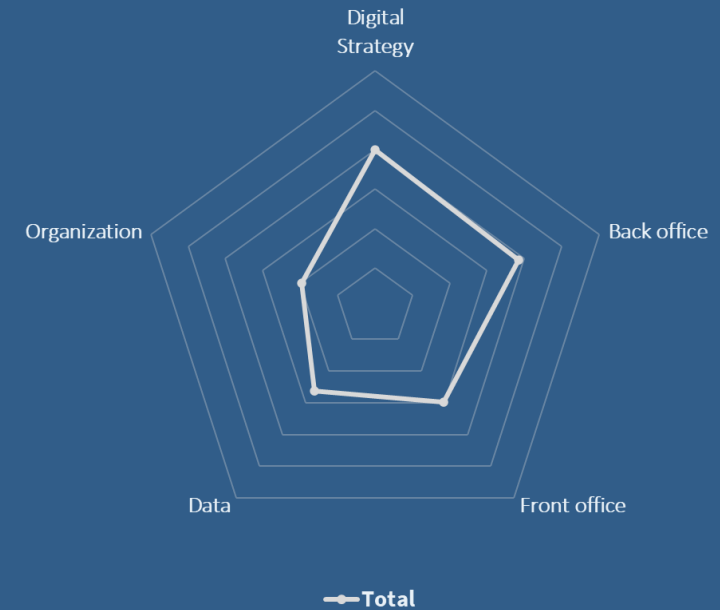
First study in 2019

- Maturity in different areas
- Comparisons across PES
- Creation of learning opportunities (e.g. discovery best-practices, common obstacles and opportunities for improvement)

Many changes since 2019

- COVID-19 crisis
- Rapid (technological & societal) developments

LAC PES



Country variations



The 2022 study

Study design

- Five dimensions
strategy, front-office, back-office, organization, data
+ overall maturity
- Re-using questions from 2019
- Additions/changes when needed
- Focus on recent changes & impact COVID-19
- Comparing (where possible) 2019 & 2022

Responses

- 9 in 2019 and 16 countries (17* responses) in 2022 (9 recurring countries)



Results are self-reported and indicate a (perceived) status (not an absolute truth)

*Two participants (2022) from Chile:

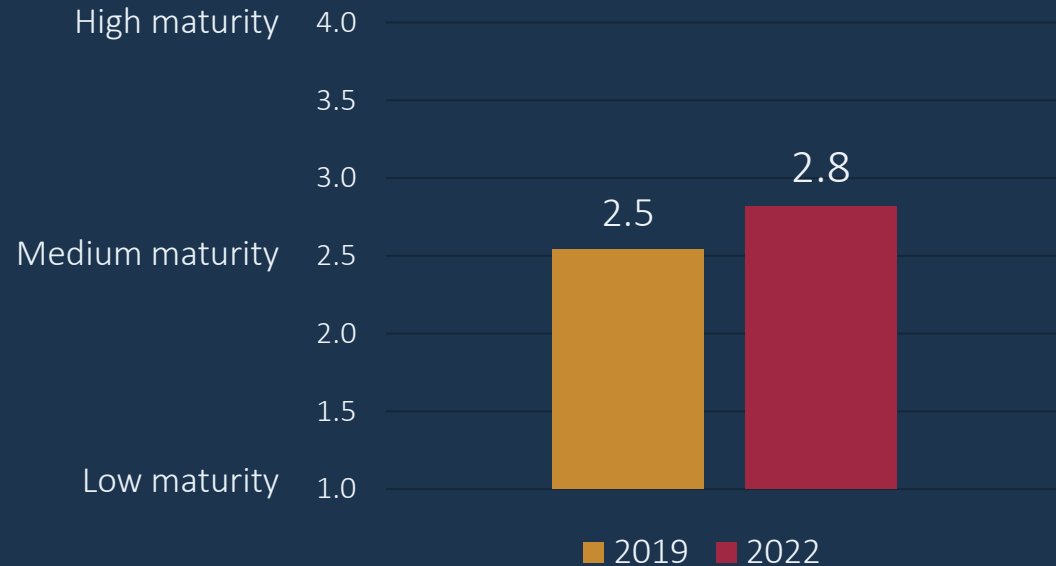
- BNE & SENCE
- Similar responses, averaged in combined country scores

Participants

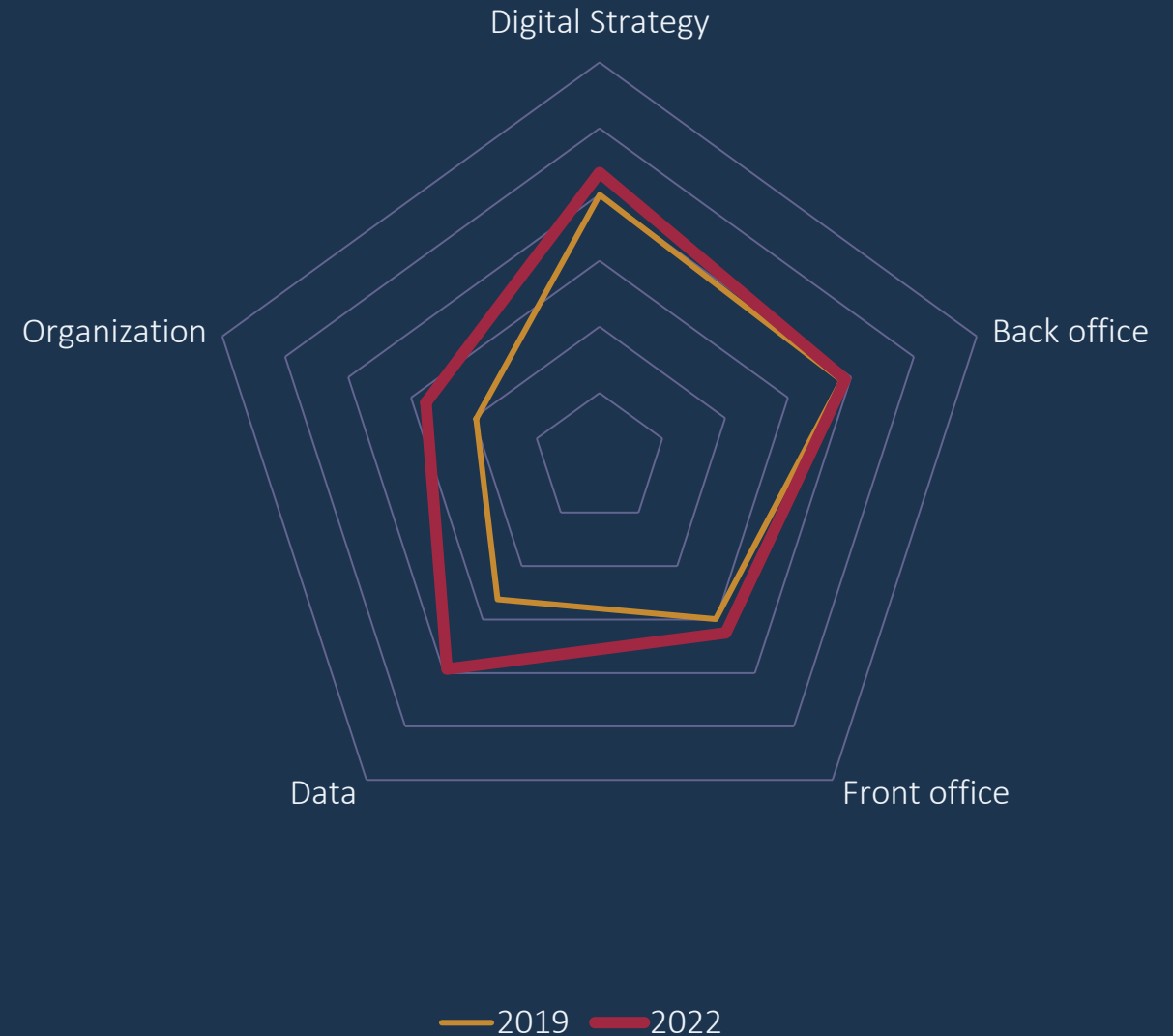
	2019	2022
Argentina		X
Barbados		X
Bolivia	X	X
Brazil	X	X
Chile*	X	X
Colombia	X	X
Costa Rica	X	X
Ecuador	X	X
Honduras		X
Mexico	X	X
Panama		X
Paraguay	X	X
Peru	X	X
Guatemala		X
Suriname		X
Uruguay		X

Overall Status

2019 & 2022

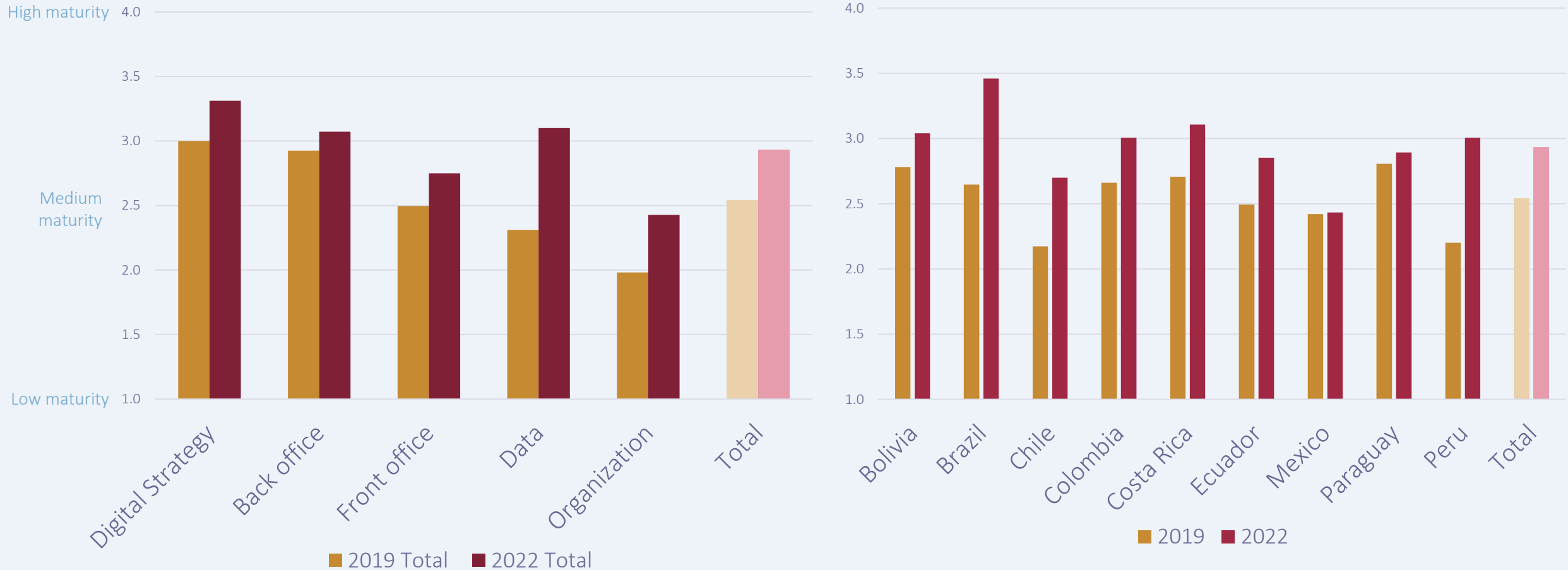


- Overall reported status across the region is higher in 2022 versus 2019
- Strongest progress has been made in the data and organization dimensions
- The other dimensions have similar scores



Overall status

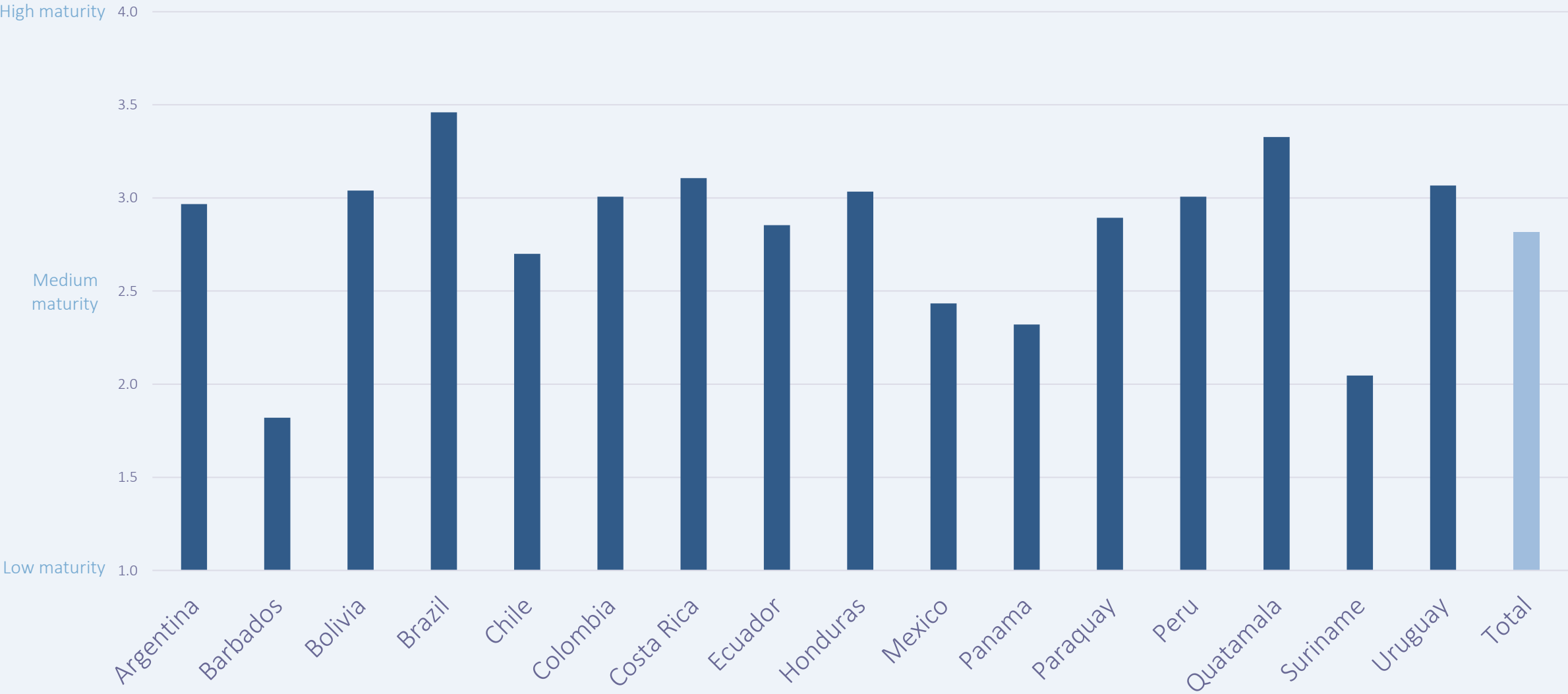
Recurring participants



- Countries that participated in 2019 and 2022 (recurring participants) score better overall
- Most countries in this group have improved, especially
 - Brazil, Chile, Peru

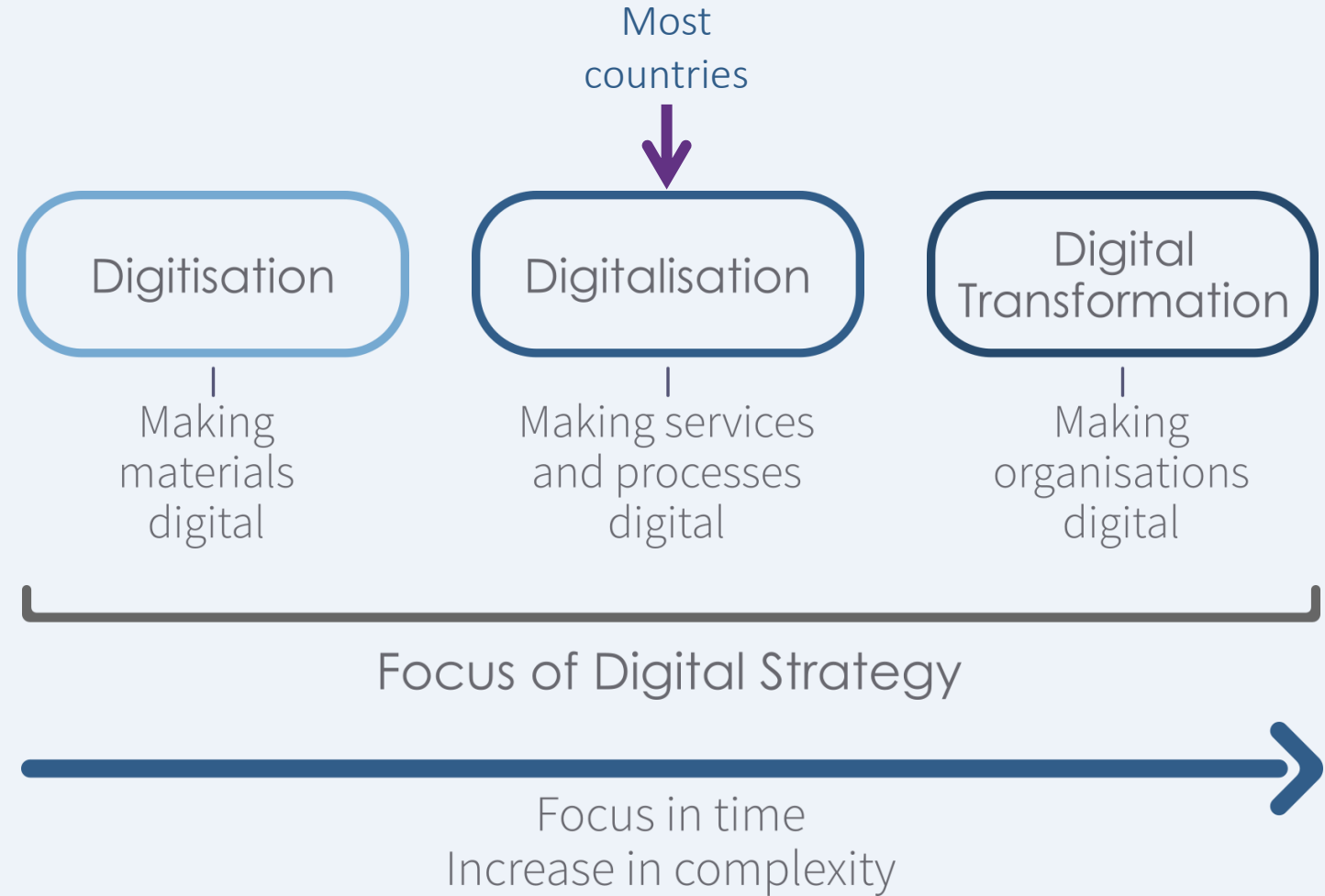
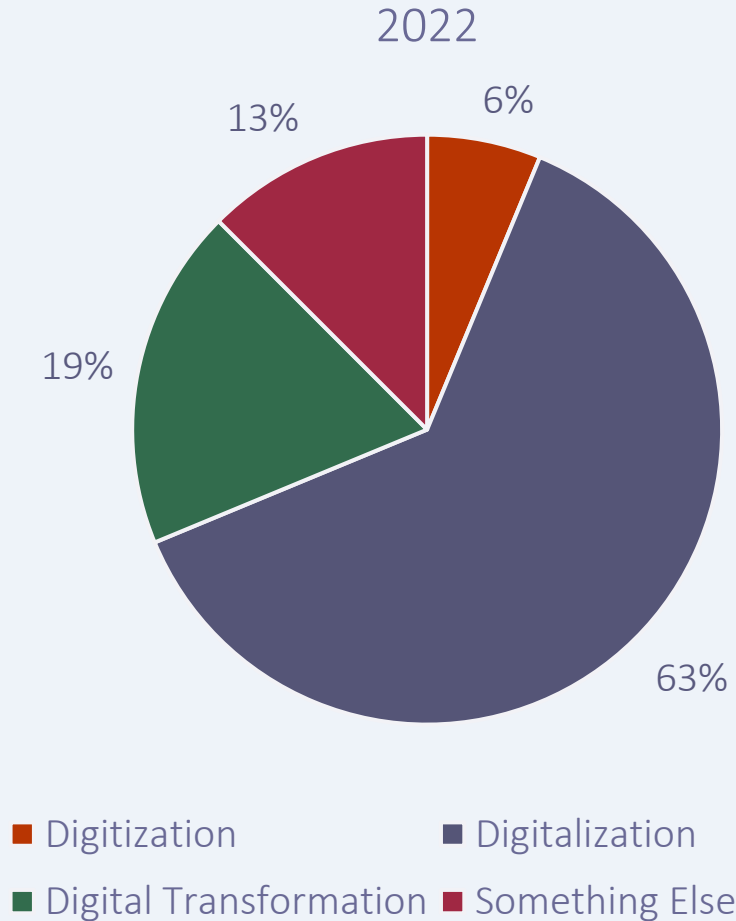
Overall status

2022 | all countries



Digital strategies

Focus of digital approaches

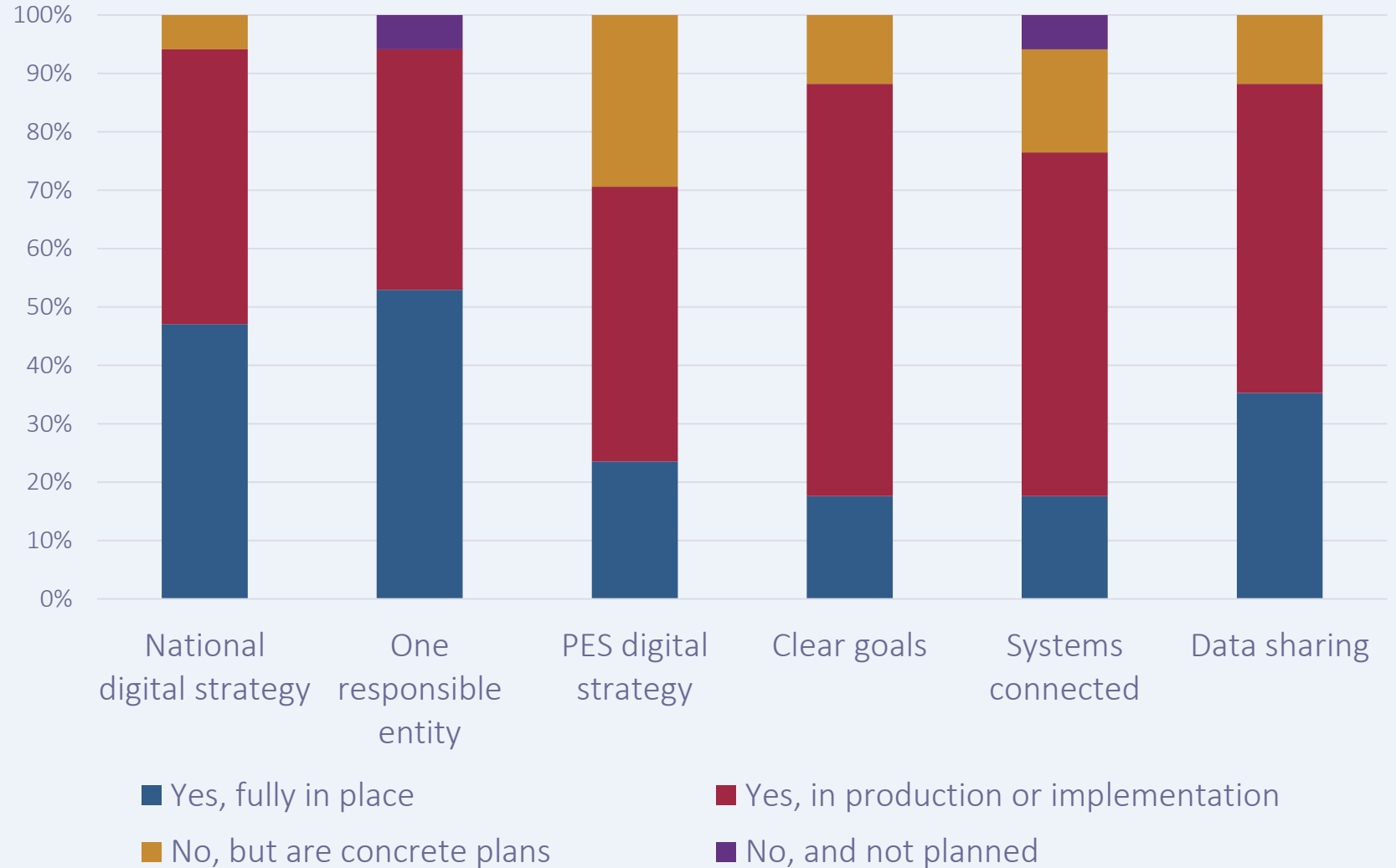


- Focus on digitalization, but leaders moving towards digital transformation

Digital strategies

Elements of digital strategies (2022)

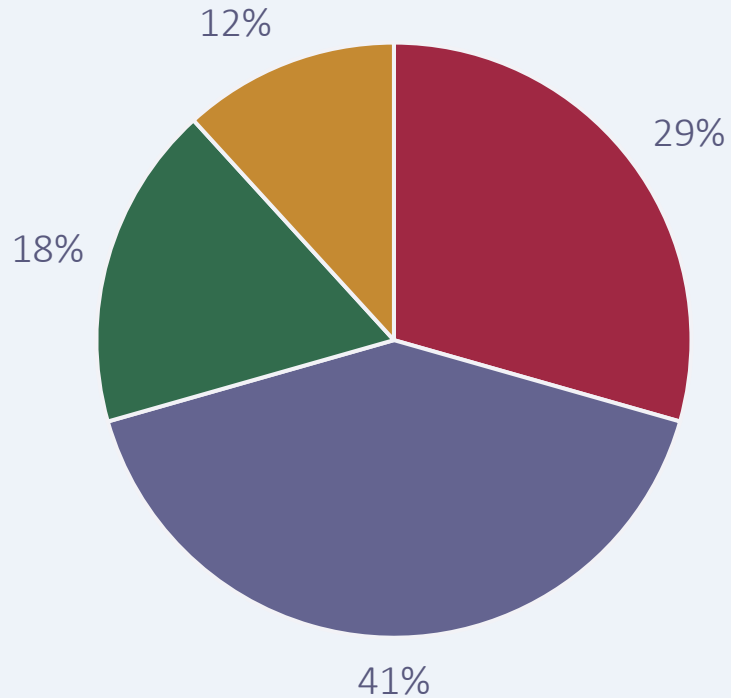
- Most elements (still) in production
- In general, compared to 2019 more elements are 'fully in place' (32% vs 24%)
- Having a digital strategy remains challenging for a large group of PES.



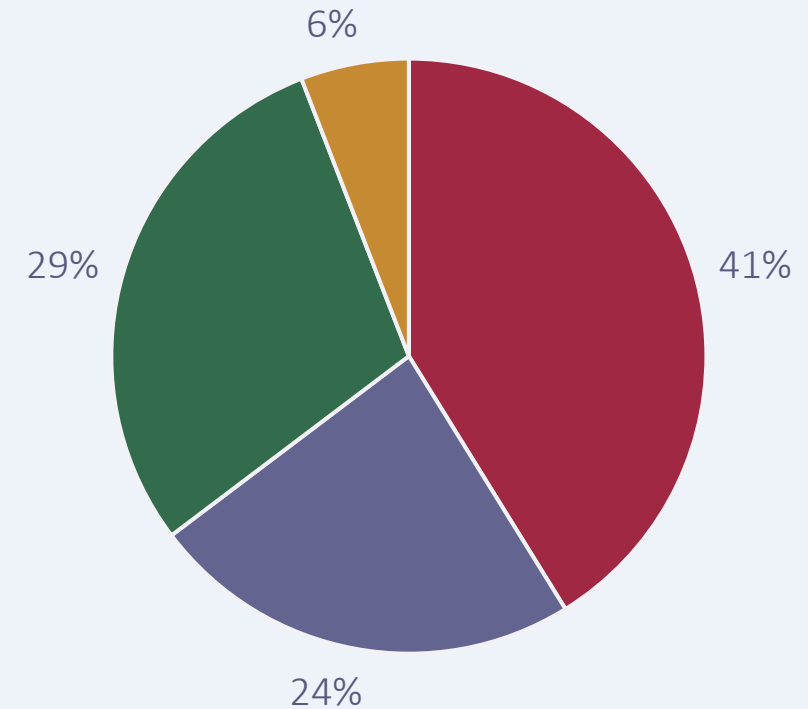
Digital strategies

Effects of COVID-19

COVID-19 impact on general budget



COVID-19 impact on digitalization budget

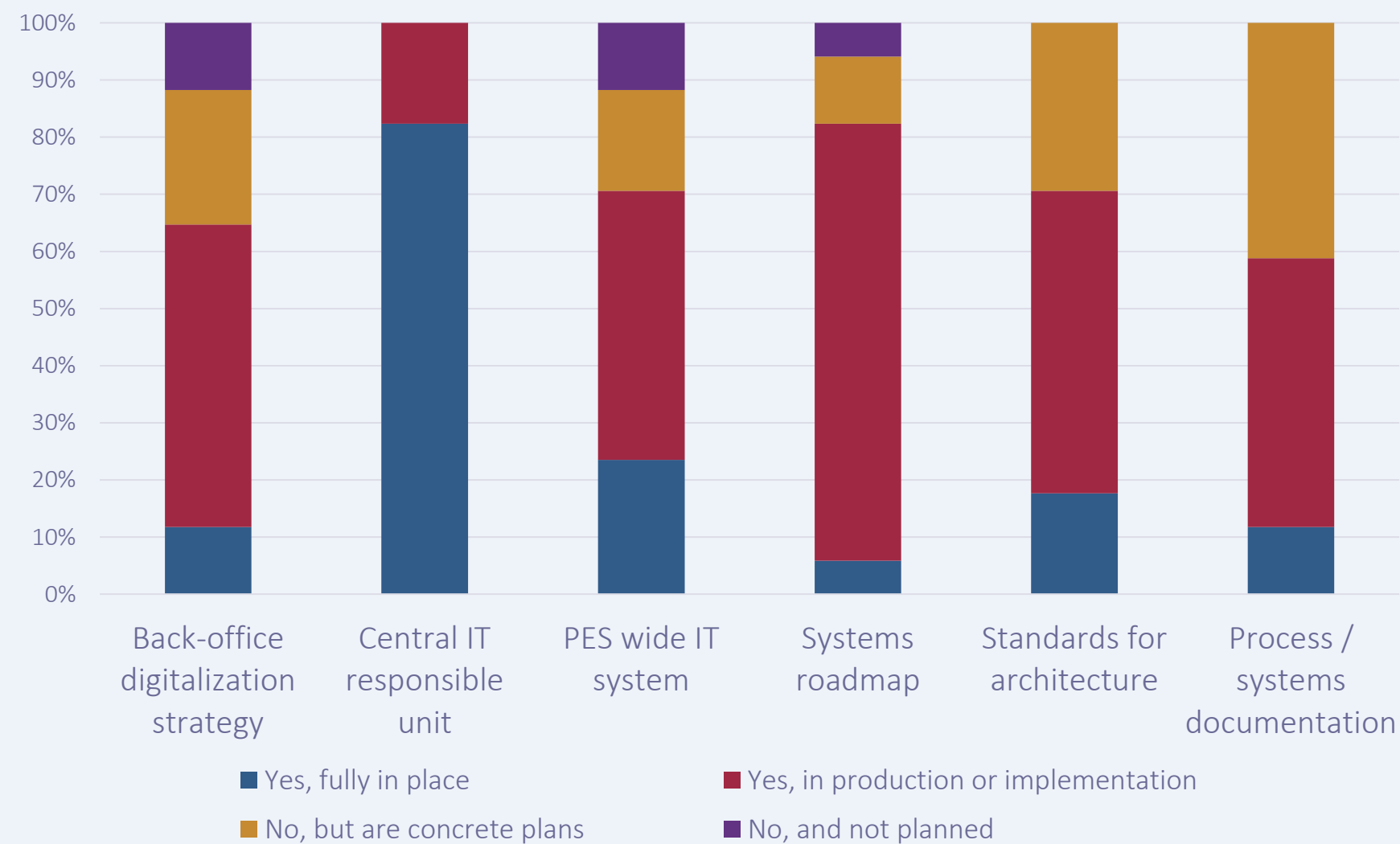


Decreased Stayed the same Increased Don't know / not applicable

- COVID-19 in general had a negative impact
- This was especially noticeable for the digitalization budget

Back-office strategies

What is happening in back-offices

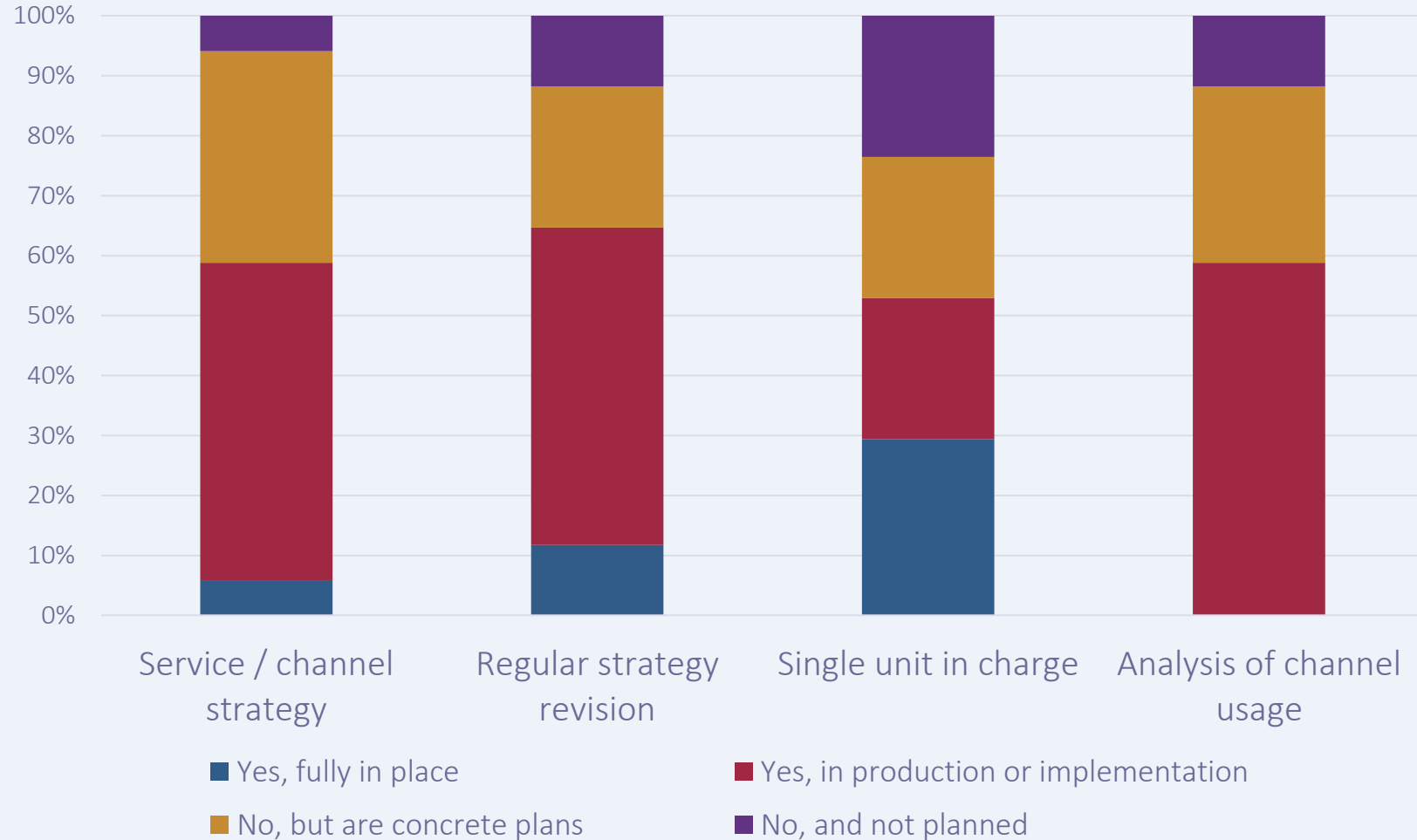


- Big leap in IT centralization
- Many countries moving from 'planning' to 'production'
- Standards and documentation are points of attention

Front-office strategies

What is happening in front-offices?

- Progress in all areas.
- Centralization important development
- Analysis is area of improvement
- Overall, the front-office is lagging behind other areas.



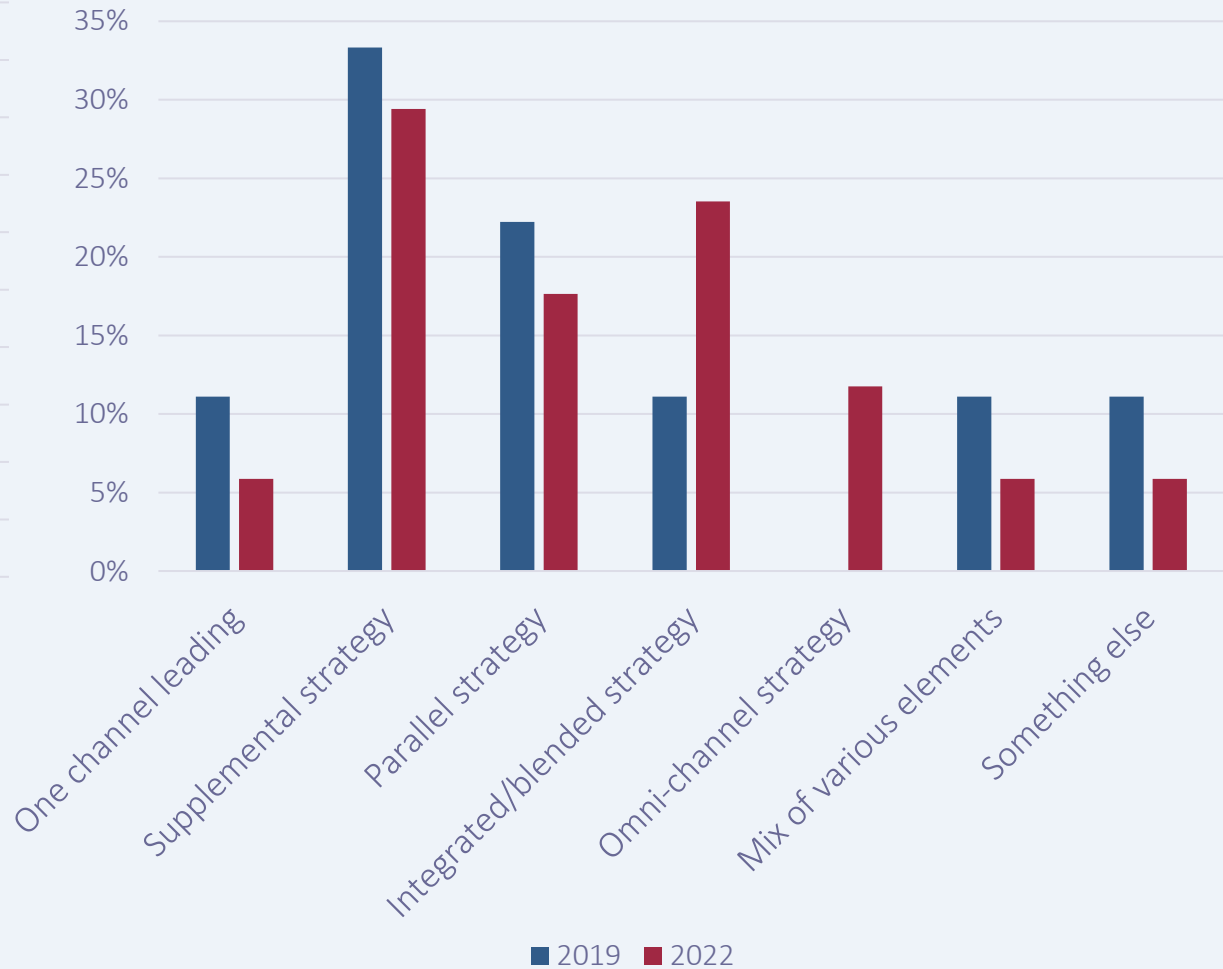
Front-office strategies

What is happening in front-offices

Is there a channel strategy?

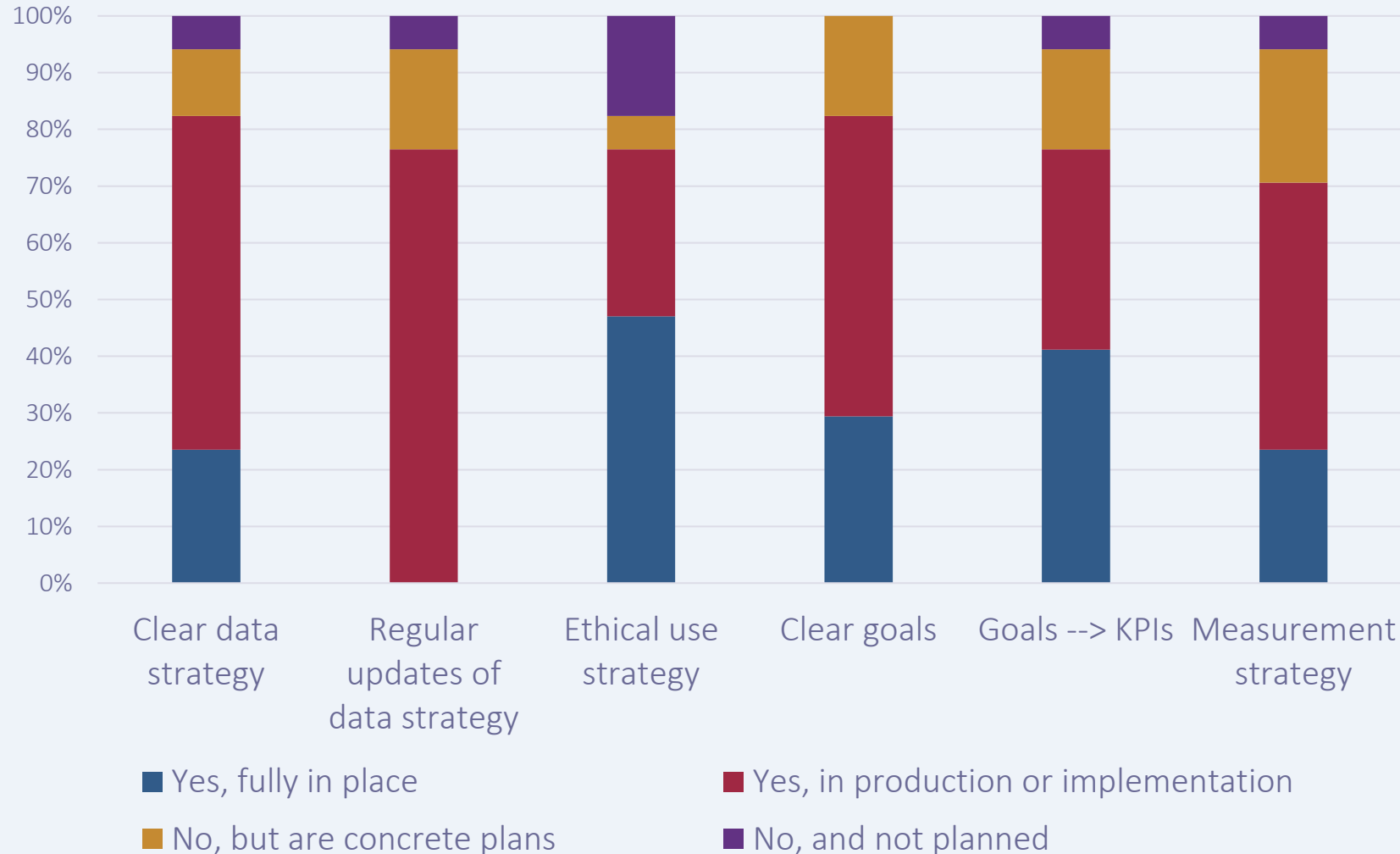


Focus of the channel strategy



Data strategies

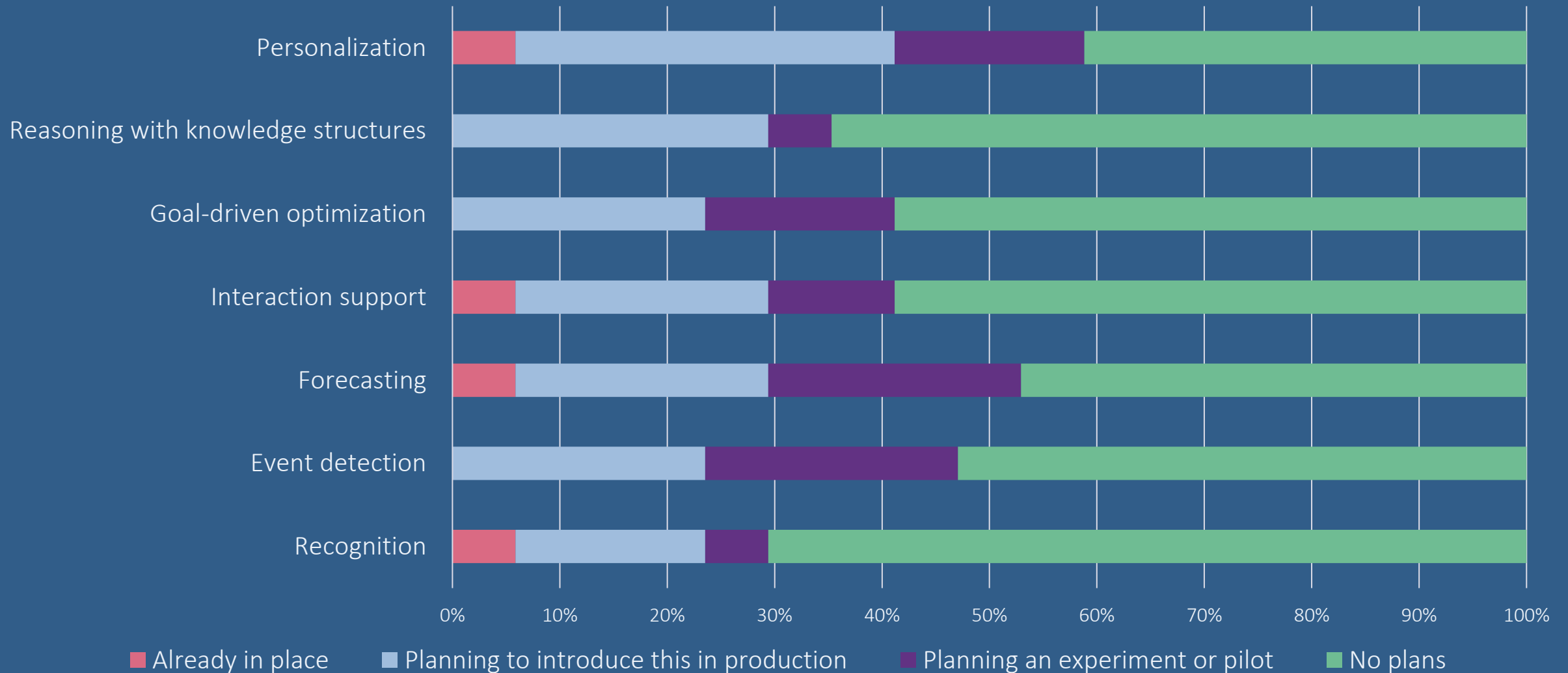
What is happening in the field of data?



- Big progress overall.
- Translating goals into KPIs most important development overall
- Ethical use of data (new element) is looking good.
- Challenge: taking the step from putting things in place to updating them.

Data strategies

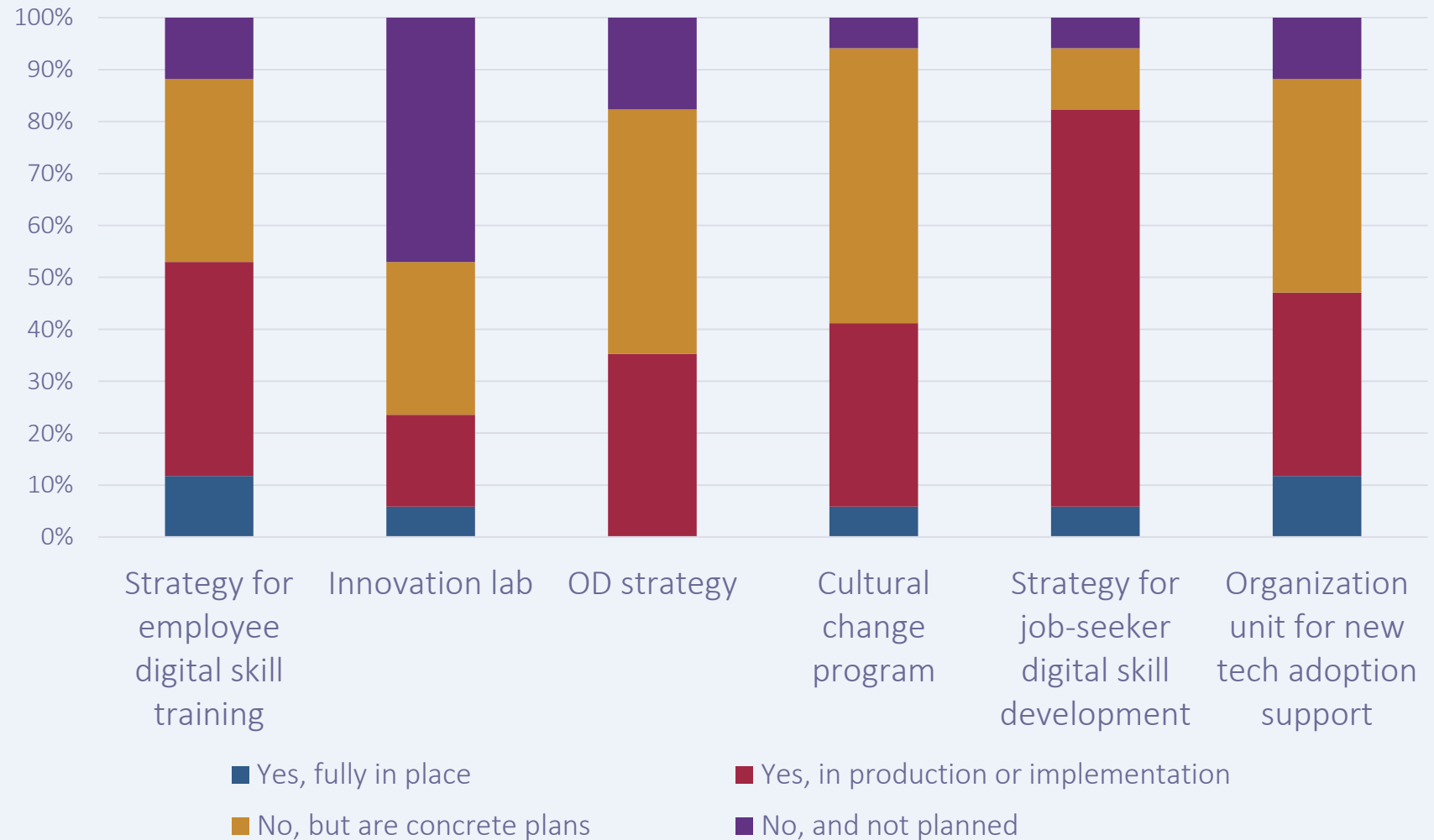
Applications of artificial intelligence



Organization strategies

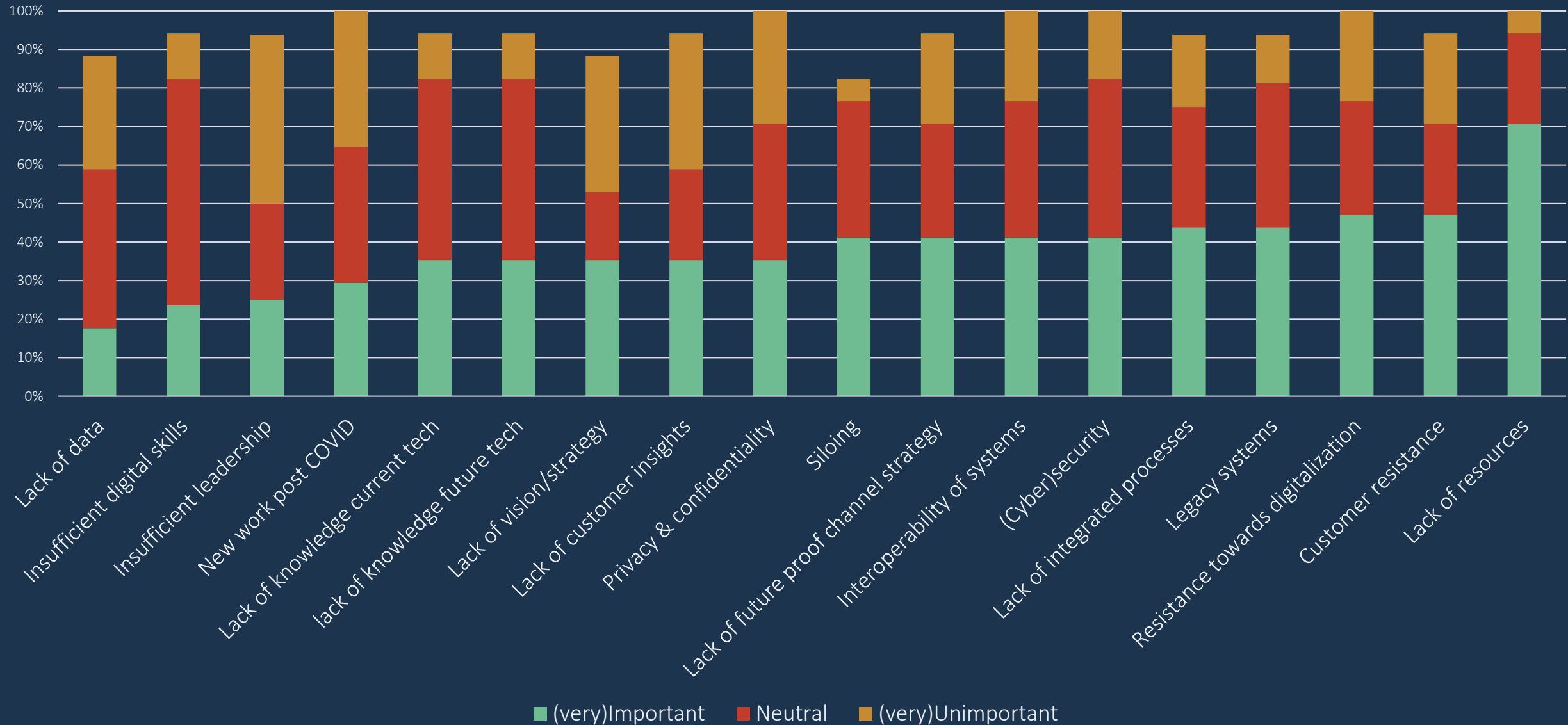
How is the organization moving along?

- Some progress in most areas.
- Digital skill training area of most progress
- Overall an area with 'plans' or elements 'being developed', therefore (still) a big opportunity area



Obstacles

What is holding PES back?



Main observations

What can we learn and (perhaps) improve

Strategy

- Lots under development
- But progress since 2019
- Having a digital strategy still a challenge for many PES

Organization

- Some progress in most areas.
- Digital skill training good progress
- Overall 'plans' or developed', thus (still) a big opportunity area

Data

- Big progress overall especially translating goals into KPIs
- Ethical use of data is looking good.
- Challenge: taking the step from putting things in place to updating them



Overall

- Progress in the region
- Most countries are improving
- Leaders are moving to Digital Transformation

Back-office

- Big leap in IT centralization
- From 'planning' to 'production'
- Standards and documentation are points of attention

Front-office

- Progress in all areas, mostly around centralization
- Analysis is area of improvement
- Overall, the front-office is lagging

Conclusions

Overall points for discussion



1

Overall strategy

- Plan for the long term, Digital Transformation as current vision

2

Get weaker areas in line

- Focus on balance as one area affects others
- Combine steady progress with 'showcases'

3

Foundations & plans

- Strategy is the factor tying things together.
- Start with the big picture and then narrow down

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willem@pieterson.com