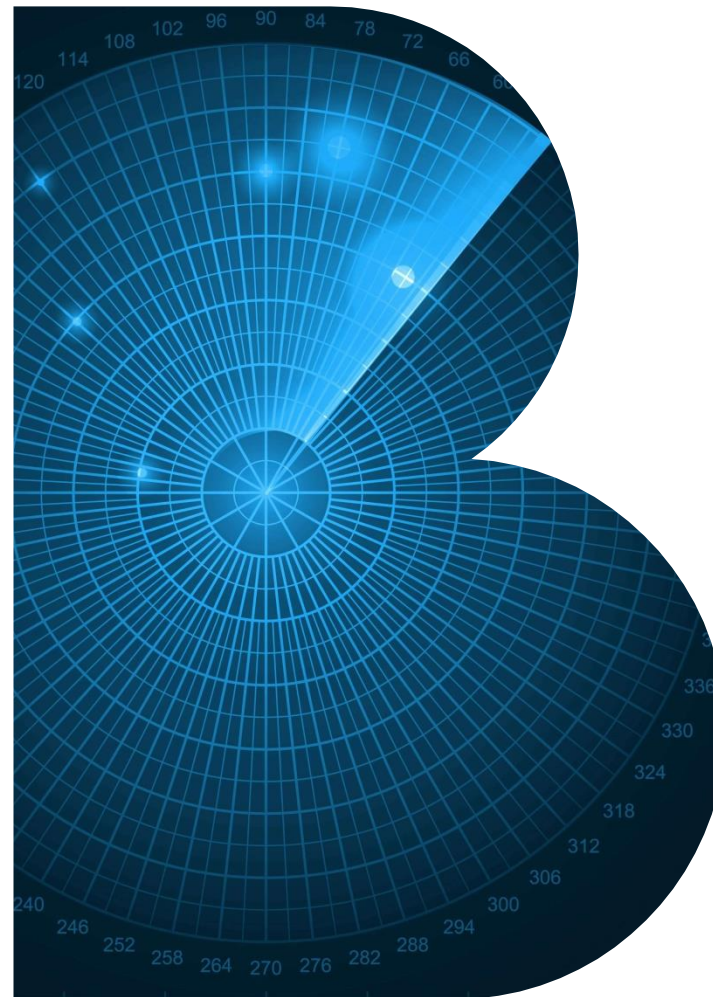


# 10<sup>th</sup> Operations Efficiency Radar



# Thank you very much for 10 years of participation!

*The **Operations Efficiency Radar 2019** marks the **10th successive annual publication** of this study by **Roland Berger** and the **International Association of Controllers (ICV)**. Our anniversary edition has once again been a great success **thanks to your participation**. The **results** of the Operations Efficiency Radar now **provide you with an additional perspective to use for tackling the challenges and setting your priorities in 2019**.*

*Thank you very much for your trust in the last ten years!*



Oliver Knapp



FH-Prof. Dr.  
Heimo Losbichler



Carmen Zillmer

# Management summary

## Background

- > The anniversary edition of the **Operations Efficiency Radar** looks back at **10 years** of a **stable economic and political environment**
- > **Currently, risks are on the rise**, such as the decrease in **political stability**, the advent of **new technologies** and the **financial environment** reaching an inflection point
- > Likewise, the **10th Operations Efficiency Radar** shows that **around 50% of the participants anticipate an economic downturn for 2019** (mixed picture by industry)

## Core analysis

- > **Company priorities in 2019:**
  - Over **70%** of the **companies focus** their activities on the **Product Portfolio** – **Other top priorities** are Production, Controlling & Finance, Sales & Marketing and Procurement
  - As a **further sign of a slowing economy**, **Working Capital Management** gained importance
  - From an **industry perspective** the priorities vary significantly, e.g. Automotive (Production & Working Capital), Industrial Products (Product Portfolio & Procurement), Consumer Goods (Product Portfolio & Logistics)
- > **Top levers in 2019:**
  - Development of future-proof **product/service portfolio** and customer-focused product/service features
  - Application of **commercial procurement** levers
  - **Efficiency** improvements in **production**

## Hot topic: Digitalization

- > **70%** of study participants **confirm the need for functions to reposition** – **80%** perceive new technologies as enablers
- > Especially **Logistics** and **Controlling & Finance** see an **opportunity** to leverage new technologies

## Recommendation

**As a consequence of the fragile environment and the increasing economic challenges, we recommend using the results of the 10th Operations Efficiency Radar to**

- > **Challenge priorities**, levers and budgets in your organization &
- > **Review your early warning systems** and **prepare for a potential crisis**


ADAPTIVE  
OPERATIONS




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**A joint study by the International Association of Controllers (ICV) and Roland Berger**

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## A. Study background and objectives



# In the last ten years, companies enjoyed a stable economic and political environment – However, risks are on the rise

## Overview of major risks



### 1 Decreasing political stability

- Sovereign debt crisis** ————— 3.7% yield on govt. bonds
- Uncontrolled BREXIT** ————— GDP risk of -4% (UK/IR)<sup>2)</sup>
- European banking woes**
- Deteriorating Chinese outlook** — Weakest GDP growth since 1990<sup>3)</sup>
- Latest EU regulations on CO<sub>2</sub>**
- Trade wars and tariffs** ————— -0.5% global GDP risk<sup>4)</sup>
- Smoldering Crimea conflict**
- Rise in populism**

### 2 New technologies and a VUCA<sup>1)</sup> environment



### 3 Financial environment reaching an inflection point

- Further **interest rate rises** in U.S. and Europe High share of **speculative grade bonds**<sup>5)</sup>
- 3%** interest rate exp. 12/19 (FED) **29%** of all rated bonds in 2017
- Oil price volatility** **Emerging market debt** **High share market valuations** **Falling investor confidence**

When will political risks impact economic growth?



How long can insufficiently prepared corporates survive?

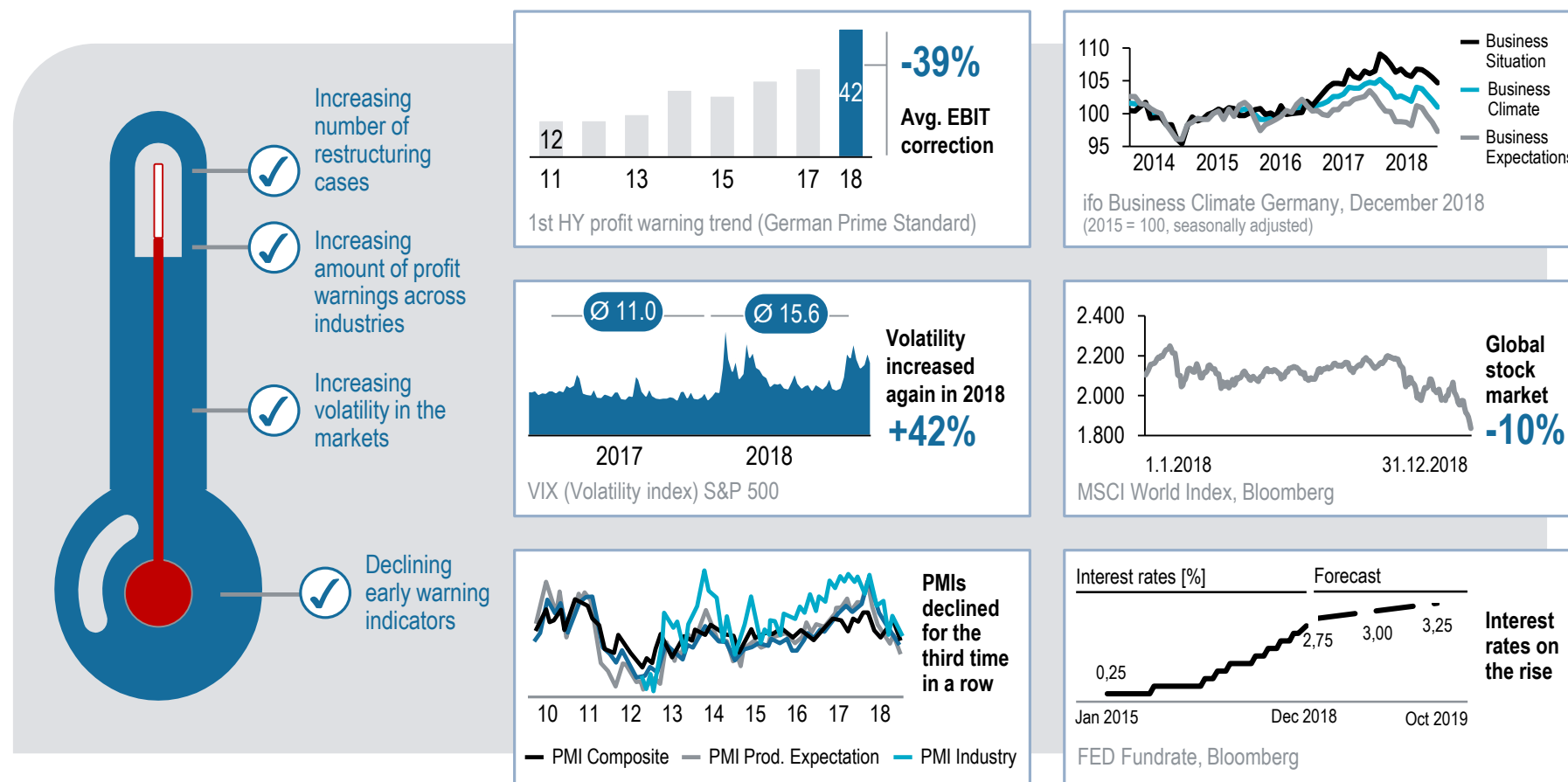


When will the changed conditions hit banks and investors?

1) VUCA = Volatility, Uncertainty, Complexity, Ambiguity 2) GDP fall in % – according to IMF expectations 3) Full year GDP growth, 2018: 6.4 percent year-on-year 4) Acc. to IMF prognosis 09/18 – Risk by 2020 5) Total speculative bond market USD 1.9 tn. Analysis excl. bonds without credit ratings, usually private placements or from smaller companies (c. 43% of bond market)

# First consequences of the fragile environment are already visible in a number of indicators

## First indicators of fragile environment



In this environment, the 10th Operations Efficiency Radar provides additional guidance on prioritized efficiency levers for 2019 overall ...

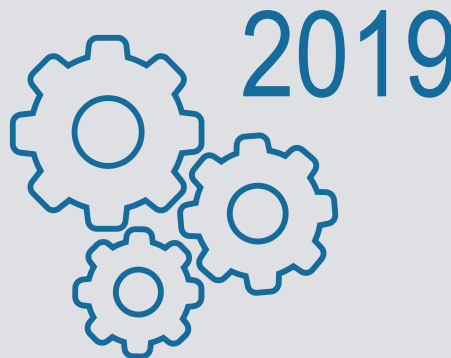
Study objectives

## Operations Efficiency Radar



### CEO/CFO

- > **Challenge functional priorities and budgets**
- > **Synchronize priorities and budgets across functions**
- > **Finetune and prioritize corporate budget and investments**



### Functional heads

- > **Benchmark functional trends**
- > **Set functional priorities**
- > **Align functional budget**



# ... and for seven key industries, including Automotive, Industrial Products and Consumer Goods

## Study perspectives

-  **Automotive**

---

-  **Aerospace & Defense**

---

-  **Industrial Products**

---

-  **Chemicals/Pharma**

---


-  **Consumer Goods and Retail**

---

-  **Industrial Services and IT**

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-  **Financial Services**



## Automotive

**90% of Automotive leaders confirm the need for functions to re-position – Highest potential in Production, Procurement & Logistics**

Digitalization: Risks and opportunities

**Risks**

For some core functions, an exclusive focus on efficiency could compromise the inherent capabilities seen as synonymous with automation (Customer and the Supplier of the customer)

Core functions could therefore experience a loss of value for the company as a whole

By reducing or eliminating capabilities in a number of disrupted areas (e.g. identification, the internal company digitization)

The gaps here to completely new tasks for some core functions

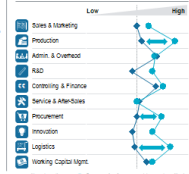
New technologies enable not only efficiency improvements but also improvements in effectiveness also

The gaps core functions the chance to add value for the company in areas of not only efficiency but effectiveness too

If core functions spot the opportunities and exploit them, they will be able to position themselves as value generators in the company

How do you assess the risk from digitalization being seen as synonymous with automation in the following functions? How do you assess the opportunity from a restructured positioning in the following functions?

Low High



Production  
Sales & Overhead  
R&D  
Marketing & Finance  
Service & After-Sales  
Procurement  
Innovation  
Logistics  
Working Capital Mgmt.

**In the Automotive industry, the focus in 2019 is on cross-functional realignment of value chain structures**

Expert view on 2019 – Automotive

The Automotive industry is changing **very dynamically**, the switch from combustion to electric engines is irreversible. However, vehicles with both drive concepts will be produced in parallel for the next 20 years. This **double burden** increases the pressure to trim the operational areas to greater efficiency, but also to

relevance and its cost base - test

**manufacturing cost reduction** any longer

ocus on sustainable process

giving the organization


res to the bare essentials,

ris and reduce logistic costs

It assignment in **indirect** agile working for OEMs and suppliers

**highest priority in the value chain – in Production**

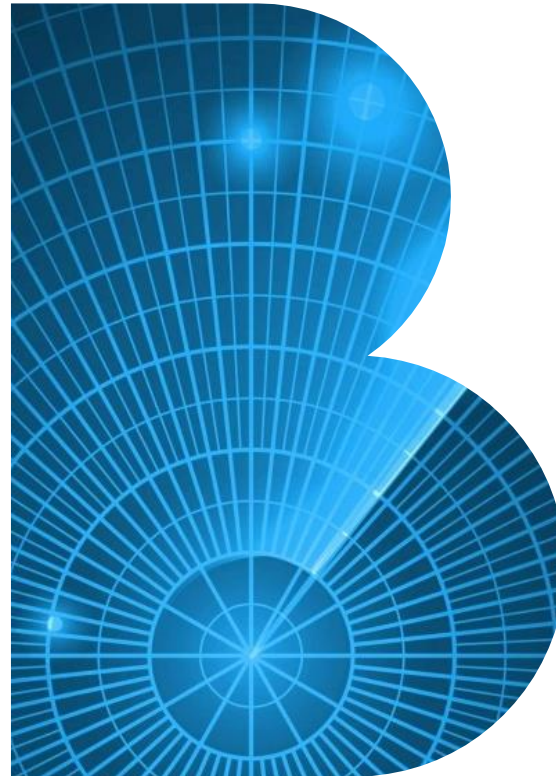
10 levers for 2019



**Top 10 levers**

- I Efficiency improvements in Production
- II Optimization of product development process
- III Development of a future-proof product/service portfolio
- IV Cross-functional cost optimization in the R&D process
- V Optimization of staffing costs
- VI Cross-functional product/service cost reduction
- VII Optimization of the global production network
- VIII Application of technical procurement levers
- IX Development of category strategies
- X Optimization of inventories in the supply chain

## B. Study results



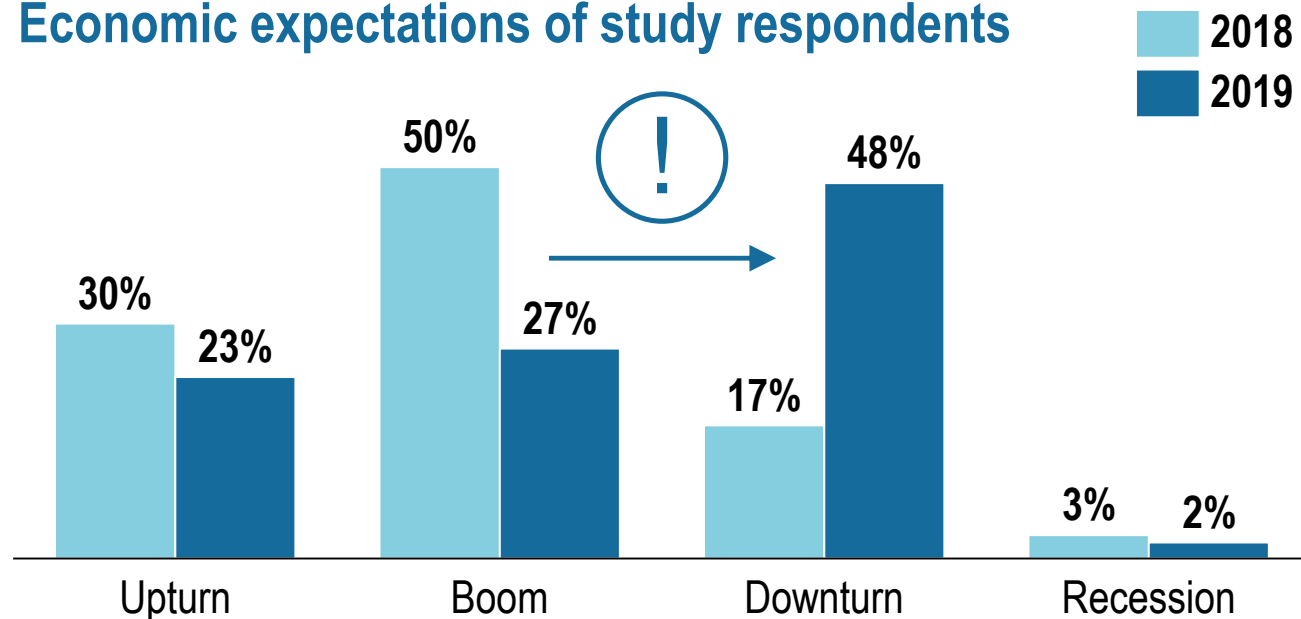
## B.1 Economic expectations & key efficiency levers for 2019



# In the 10th Operations Efficiency Radar, around 50% of participants anticipate an economic downturn for 2019 – The mood is shifting

## Economic expectations – Overview

### Economic expectations of study respondents



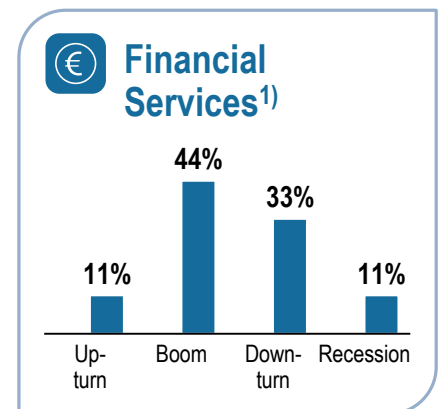
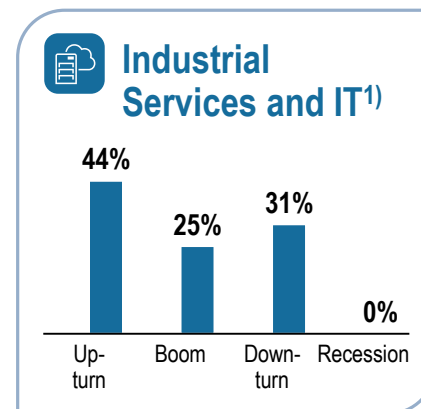
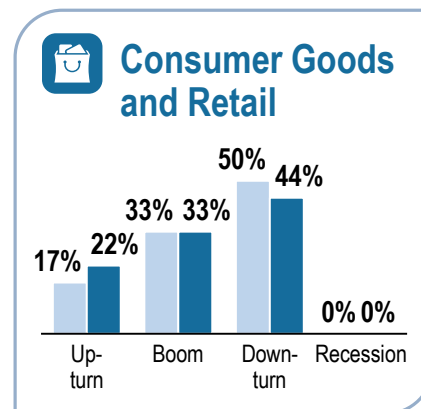
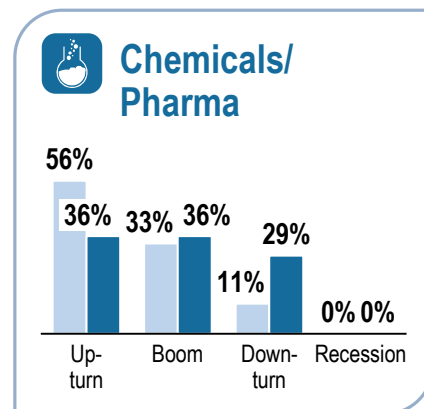
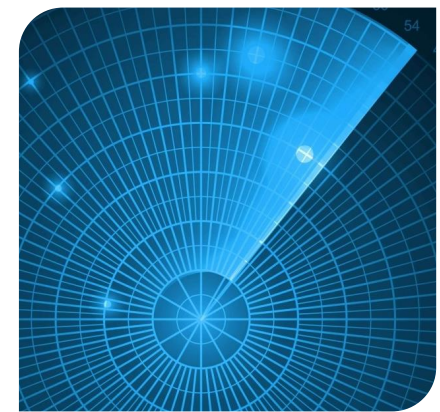
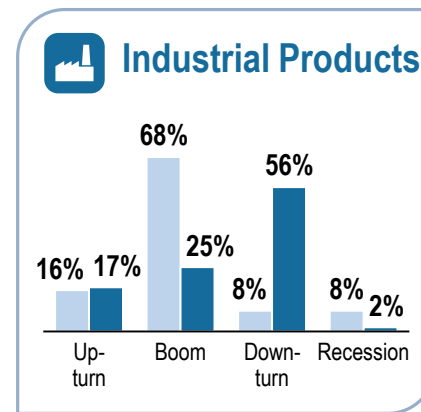
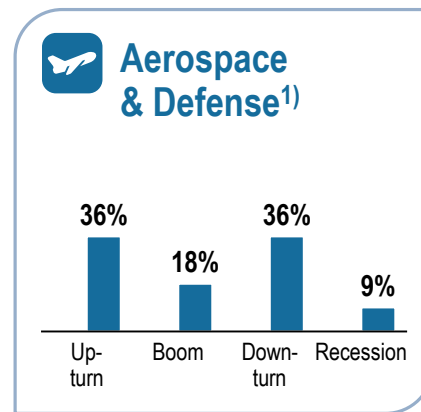
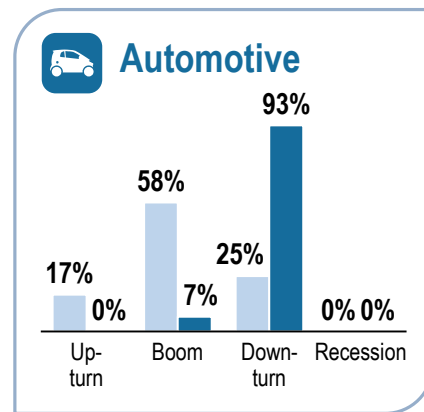
10th Operations  
Efficiency Radar



About half of study respondents anticipate a downturn for 2019 –  
Last year, a large proportion still expected a boom

# Especially leaders from the Automotive industry (>90%) expect an economic downturn for 2019 – Other industries show a mixed picture

## Economic expectations – Per industry

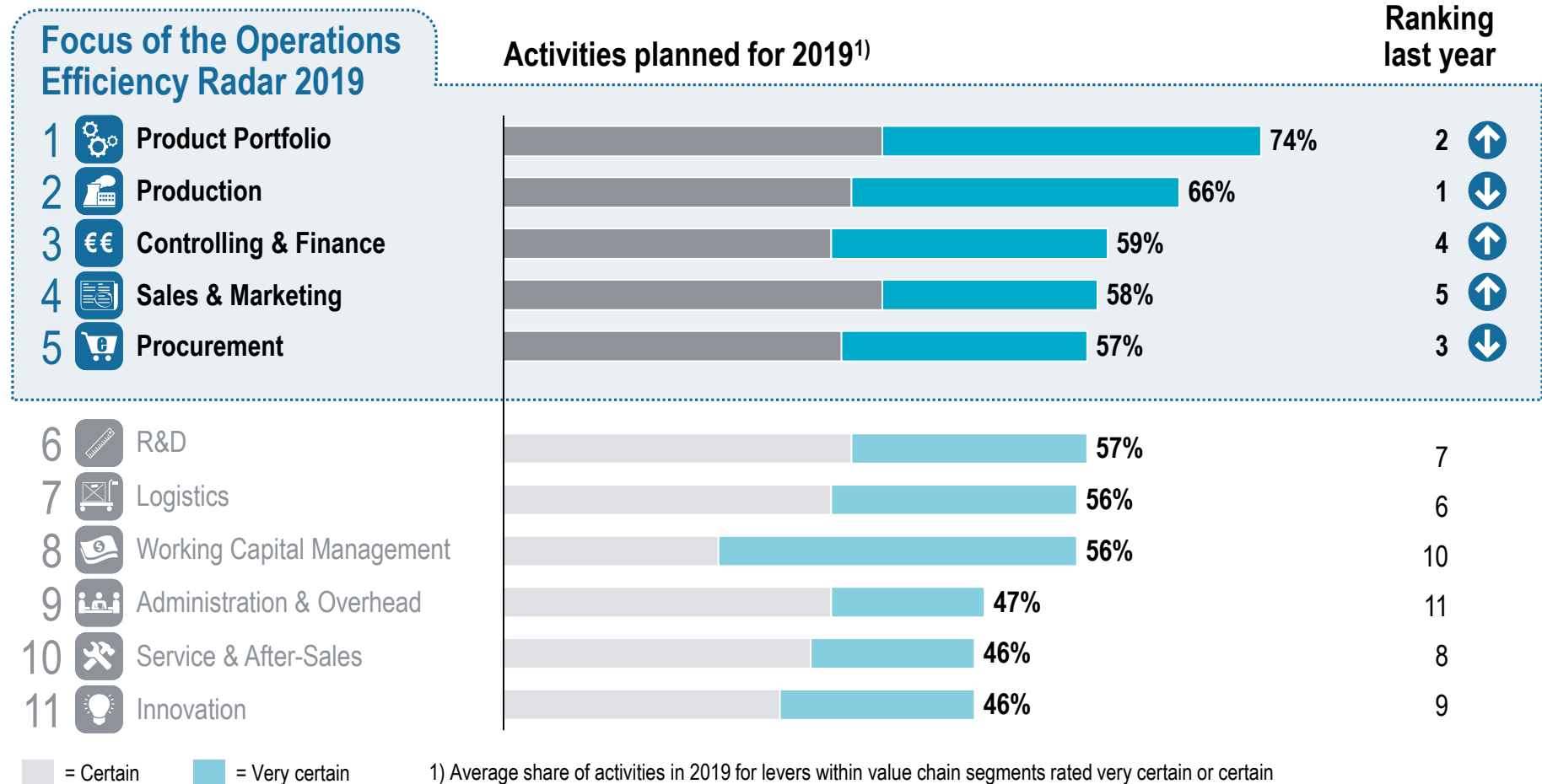


■ 2018 ■ 2019

1) Industry perspective not available in prior issue  
Source: Survey results of Operations Efficiency Radar 2018 and 2019

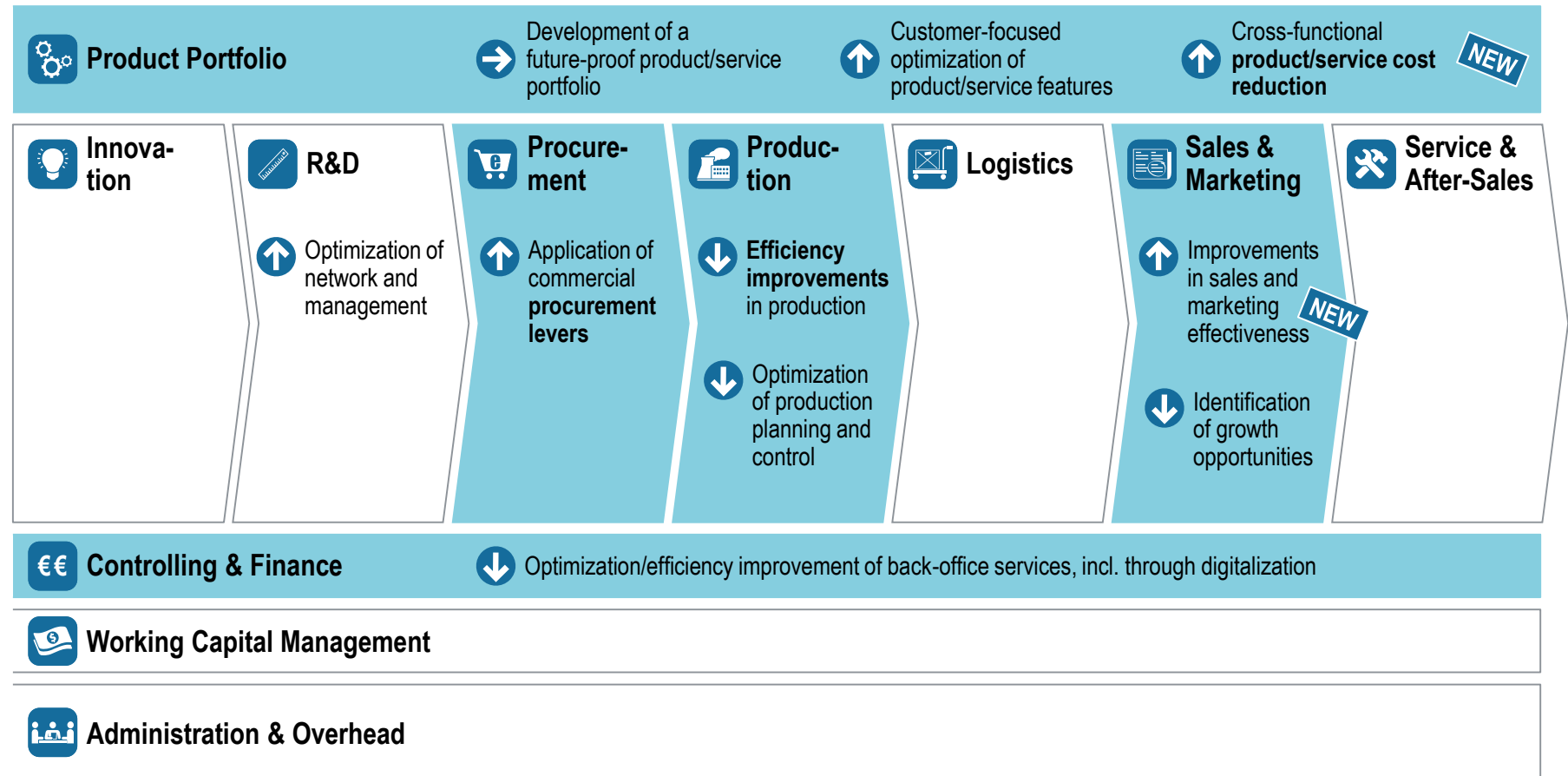
# In terms of priorities for 2019, >70% of companies focus their activities on the Product Portfolio – Controlling & Finance is catching up

## Company priorities in 2019



# The top 10 levers focus on areas such as cost improvement in the product portfolio, material cost reduction and efficiency in production

## Top 10 levers



Focus areas for the Operations Efficiency Radar 2019

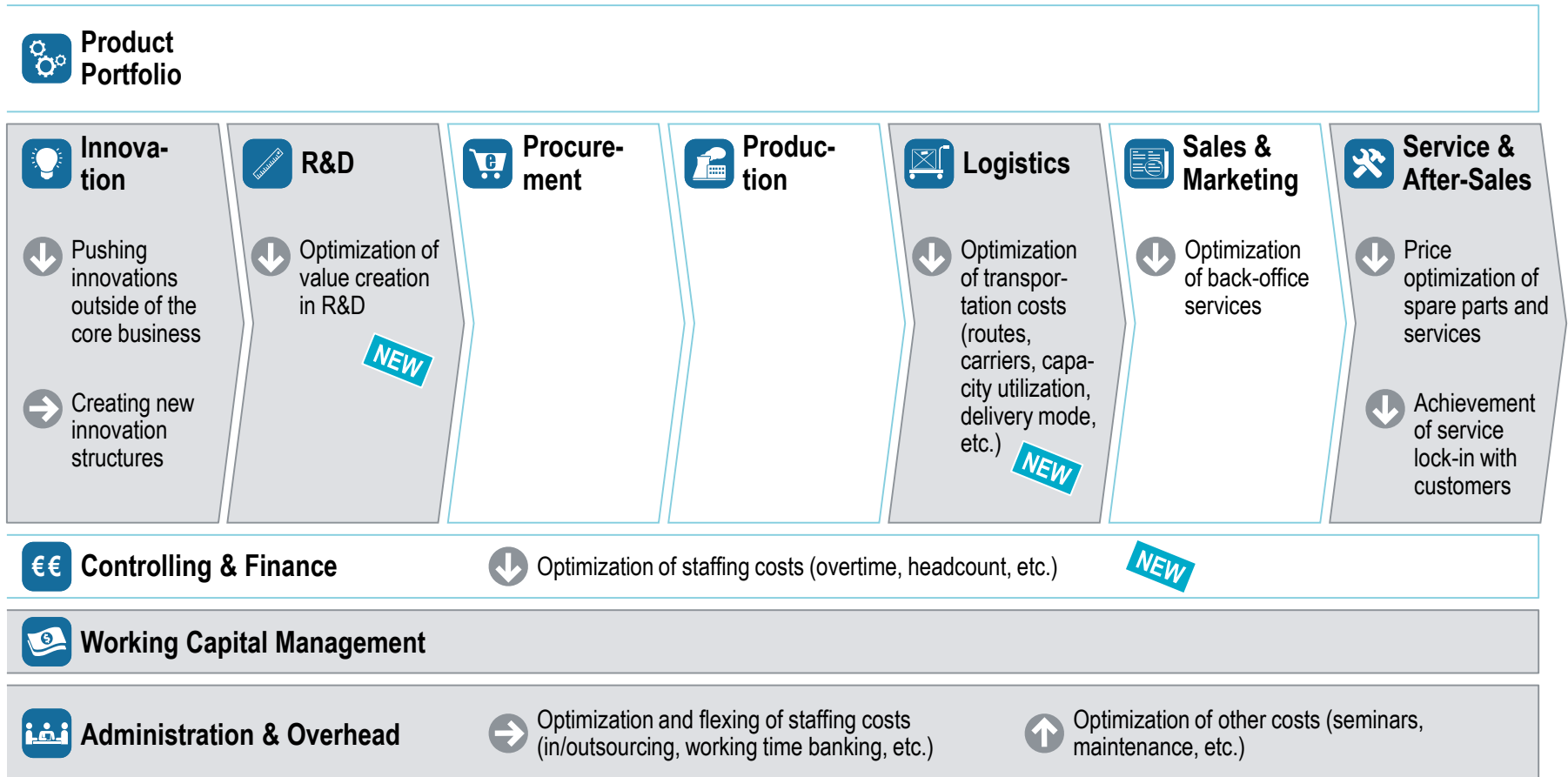
↑ Top lever (climbing – better ranking than in 2018) ↓ Top lever (falling – worse ranking than in 2018)

**NEW** New in the top 10 since last year

Source: Survey results of Operations Efficiency Radar 2018 and 2019

# By contrast, companies deprioritized levers in areas like Administration & Overhead

## Flop 10 levers



Non-focus areas for the Operations Efficiency Radar 2019

↓ Flop lever (falling – worse ranking than in 2018)    ↑ Flop lever (climbing – better ranking than in 2018)

**NEW** New in the flop 10 since last year

Source: Survey results of Operations Efficiency Radar 2018 and 2019



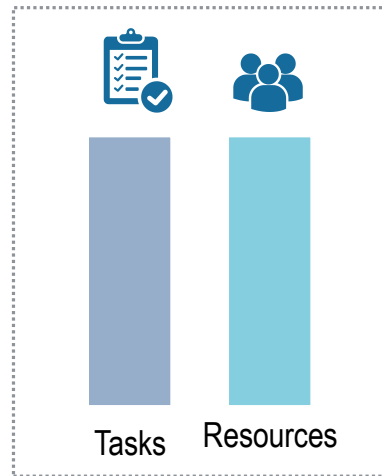
## B.2 Hot topic: Digitalization



# Many companies interpret digitalization as automation – It will ultimately dwarf many functions, thus, they must reposition

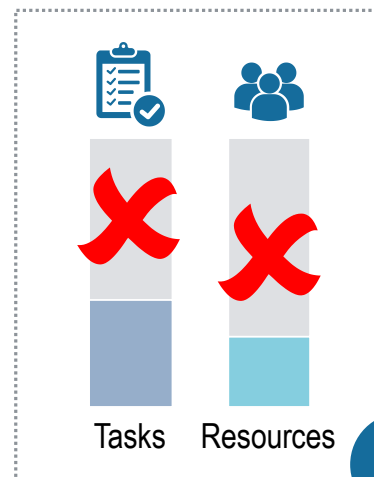
Need for action

## Function X today



- > Automation of large parts of operational, tactical & strategic tasks
- > Focus on efficiency

## Function X tomorrow



## Function must

- > Reposition itself
- > Define a new/ extended value proposition



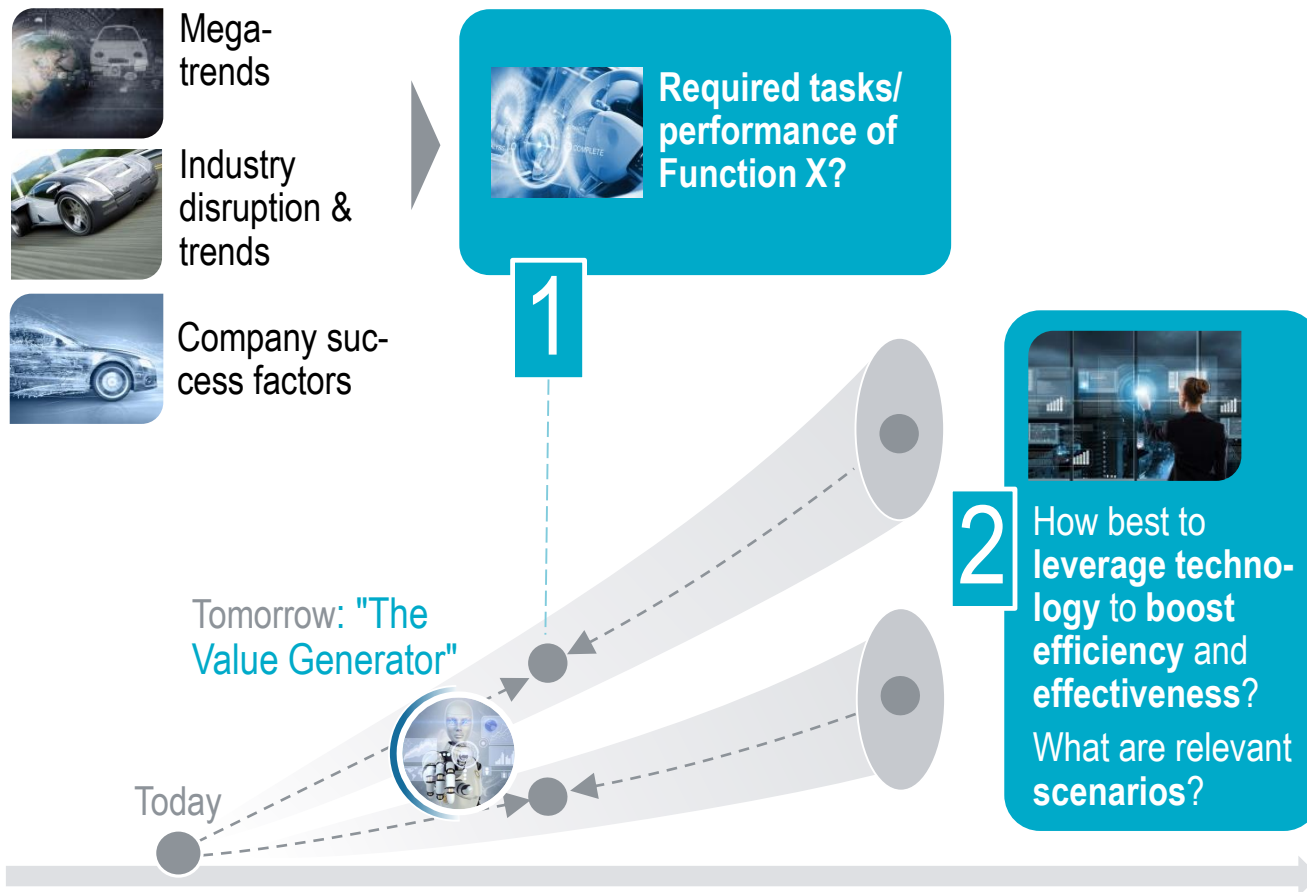
Today

Tomorrow



# As all functions try to reposition, seizing the opportunities of industry disruption and technology development, ...

Unprecedented opportunity



... some will manage to position themselves as "Value Generators", others will not and end up as "Efficient Machines" – The race is on!

Future value add (selected examples)

## Who will ...

- > Identify innovation?
- > "Source" startups?
- > Conduct pattern recognition in SC data?
- > Drive the use of RPA & AI?
- > Identify risks using internal and external data sources?
- > ...?



**"The Efficient Machine"**  
(lean & mean)

Digital endgame scenarios

**"The Value Generator"**  
(handsome & smart)



Finance
Sales & Marketing
Engineering/R&D
Procurement
Supply Chain Management
IT
...

# 70% of study participants confirm the need for functions to reposition – 80% perceive new technologies as enablers

## Risks and opportunities of digitalization for corporate functions

### Risks



For some corporate functions, an excl. focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation<sup>1)</sup>



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



### Opportunities



My industry is changing permanently as a result of disruptive forces<sup>2)</sup>



This gives rise to completely new tasks for some corporate functions



New technologies enable not only efficiency improvements but improvements in effectiveness also



This gives corporate functions the chance to add value for the company in terms of both efficiency and effectiveness



■ = Agree   ■ = Agree strongly

1) "Whatever can be automated will be automated"   2) E.g. electrification, the sharing economy, digitalization

If corporate functions **spot the opportunities and exploit them**, they will be able to position themselves as **value generators** in the company

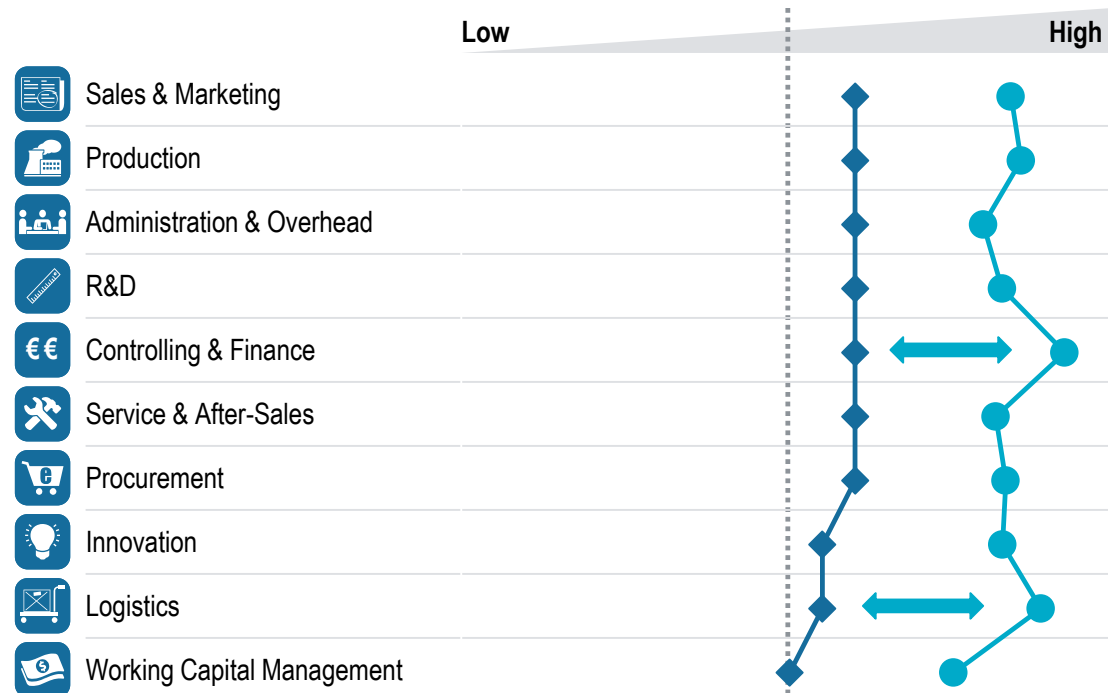


# Especially Logistics and Controlling & Finance see an opportunity to leverage new technologies to reposition the function

## Effects per corporate function

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



### Highlights per industry

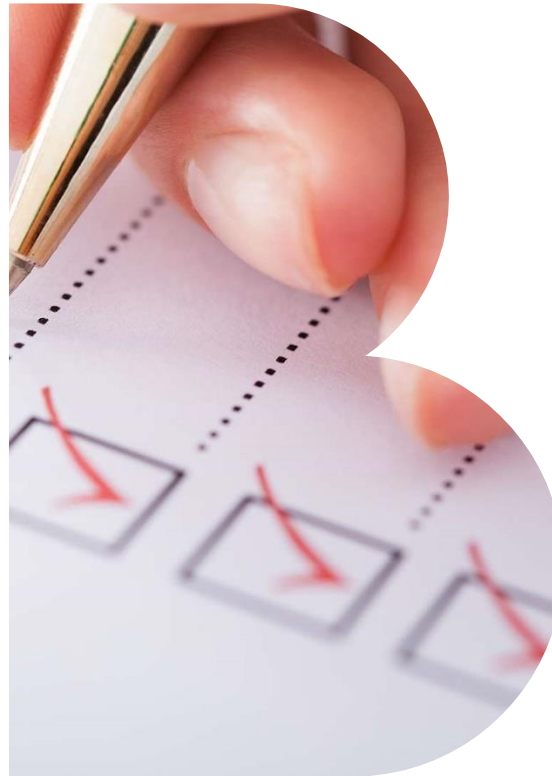
- Automotive:** Call for action in Production and Logistics and negative gap for Administration & Overhead and Service & After-Sales
- Aerospace & Defense:** Lower scores for risks and opportunities in almost every function – Only Production, Logistics and R&D perceived comparably to other industries
- Industrial Products:** Slightly above average in all functions, significantly higher opportunities perceived for Procurement
- Chemicals/Pharma:** Production perceived to hold greater risks than opportunities – Call for action in R&D
- Consumer Goods and Retail:** Greater opportunities perceived for Service & After-Sales
- Industrial Services and IT:** In contrast to the average, negative gap for Controlling & Finance and call for action in Innovation and R&D
- Financial Services:** Additional call for action in Procurement and Service & After-Sales

◆ Risk from digitalization being seen as synonymous with automation









● Opportunity from a new/changed positioning

↔ Call for action

## B.3 Summary per industry & across industries



# Please find your industry details on the following pages

Industry	Page
 <b>Automotive</b>	25
 <b>Aerospace &amp; Defense</b>	28
 <b>Industrial Products</b>	31
 <b>Chemicals/Pharma</b>	34
 <b>Consumer Goods and Retail</b>	37
 <b>Industrial Services and IT</b>	40
 <b>Financial Services</b>	43
 <b>Summary of priorities across industries</b>	46



# In the Automotive industry, the focus in 2019 is on cross-functional realignment of value chain structures

## Expert view on 2019 – Automotive



The Automotive industry is changing **very dynamically** – the switch from combustion to **electric engines is irreversible**. However, vehicles with both drive concepts will be produced in parallel for the next 20 years. This **double burden** increases the pressure to trim the operational areas to achieve greater efficiency, but also to boldly tackle the restructuring of the value chain:

- > Consistently check the **depth of value add** for future relevance and its cost base – what is not **relevant to competition** must be put to the test
- > Take greater **account of manufacturability** and **manufacturing cost reduction** in design phase as costs cannot be compensated for in production any longer
- > Significantly increase **efficiency** in production and focus on **sustainable process quality** – providing a competitive advantage and relieving the organization
- > Limit **investments in traditional production structures** to the bare essentials, seek **cooperation** with competitors to avoid investments and reduce logistics costs
- > Develop efficient working models and harmonious task assignment in **indirect structures** as well as support process digitalization for agile working

**More ambition, courage and cooperation** will be key for OEMs and suppliers



**Michael  
W. Rüger**

Senior Partner



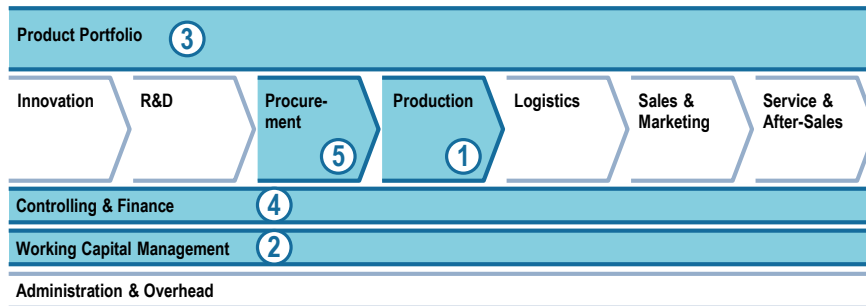
Responsible Partner for  
Automotive Operations,  
Central Europe

# In Automotive, Production has the highest priority in the value chain

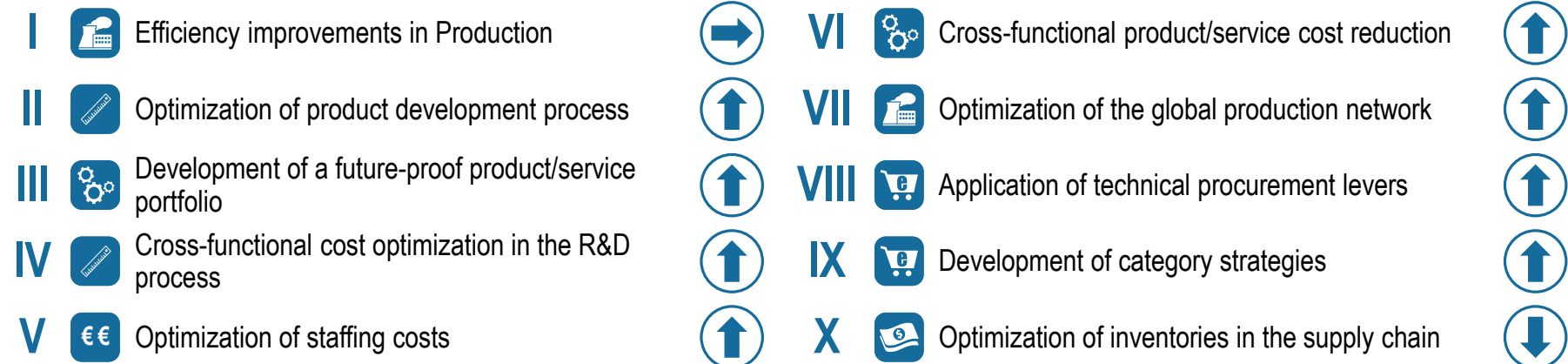
## – Top lever: Efficiency improvement in Production




Value chain priorities and top 10 planned levers for 2019

### Value chain priorities



### Top 10 levers



 Value chain priorities of industry     Ranking of value chain segments     Trend compared to 2018

# 90% of Automotive leaders confirm the need for functions to reposition – Highest potential in Production, Procurement & Logistics

## Digitalization: Risks and opportunities

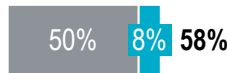
### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



### Opportunities



My industry is changing permanently as a result of disruptive forces (e.g. electrification, the sharing economy, digitalization)



This gives rise to completely new tasks for some corporate functions



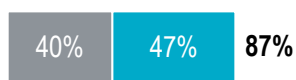
New technologies enable not only efficiency improvements but improvements in effectiveness also



This gives corporate functions the chance to add value for the company in terms of both efficiency and effectiveness



If corporate functions **spot the opportunities and exploit them**, they will be able to position themselves as **value generators** in the company



■ = Agree

■ = Agree strongly

◆ Risk from digitalization being seen as synonymous with automation

● Opportunity from a new/changed positioning

↔ Call for action

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# We expect significant changes across the Aerospace & Defense industry driven by new programs, disruption and digitalization

## Expert view on 2019 – Aerospace & Defense



We are expecting **significant change across the Aerospace & Defense industry** in the coming years

- > In **civil aerospace** we will see **disruptions of the traditional value chains** as OEMs seek to rebalance industry profit pools between them and suppliers – look out for more insourcing from OEMs, which will lead to further strategic repositioning and consolidation on supplier side. In view of new program launches in the mid-2020s we expect fundamental reconfigurations of the value chain
- > With **strong backlogs in defense**, execution excellence will be the key theme in the defense industry in the coming years. Due to a new push for European programs (fighters, tanks, drones) a new wave of European consolidation is likely to be triggered
- > Reduced launch costs will continue to enable **new applications and business models in space**. Traditional suppliers will need to transform themselves as they are being challenged by startups and new entrants from other industries
- > **Across all segments, digitalization** will continue to transform the industry – the main focus will be on further automating production processes and digitalizing the supply chain



**Manfred  
Hader**

Senior Partner

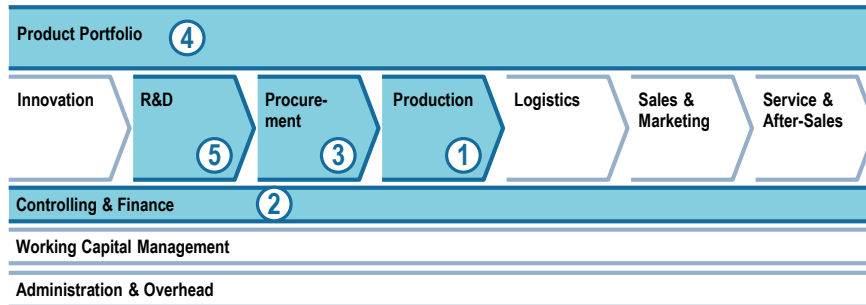


Co-Head of Global  
Aerospace & Defense  
Practice











# In A&D, Production has the highest priority in the value chain – Top lever: Application of commercial procurement levers

Value chain priorities and top 10 planned levers for 2019

## Value chain priorities



## Top 10 levers

- I  Application of commercial procurement levers
- II  Optimization of production planning and control
- III  Optimization of staffing costs
- IV  Optimization/efficiency improvement of back-office services incl. through digitalization
- V  Optimization of value creation in Production
- VI  Optimization of product development process
- VII  Efficiency improvements in Production
- VIII  Customer-focused optimization of product/service features
- IX  Cross-functional product/service cost reduction
- X  Optimization of corporate structures and processes, procurement management and systems

 Value chain priorities of industry     Ranking of value chain segments

# 73% of Aerospace and Defense leaders confirm the need for functions to reposition – Highest potential in Production & Logistics

## Digitalization: Risks and opportunities

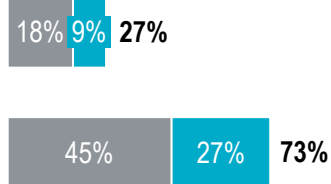
### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



### Opportunities



My industry is changing permanently as a result of disruptive forces (e.g. electrification, the sharing economy, digitalization)



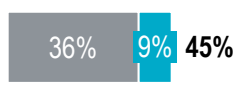
This gives rise to completely new tasks for some corporate functions



New technologies enable not only efficiency improvements but improvements in effectiveness also



This gives corporate functions the chance to add value for the company in terms of both efficiency and effectiveness



If corporate functions **spot the opportunities and exploit them**, they will be able to position themselves as **value generators** in the company



■ = Agree

■ = Agree strongly

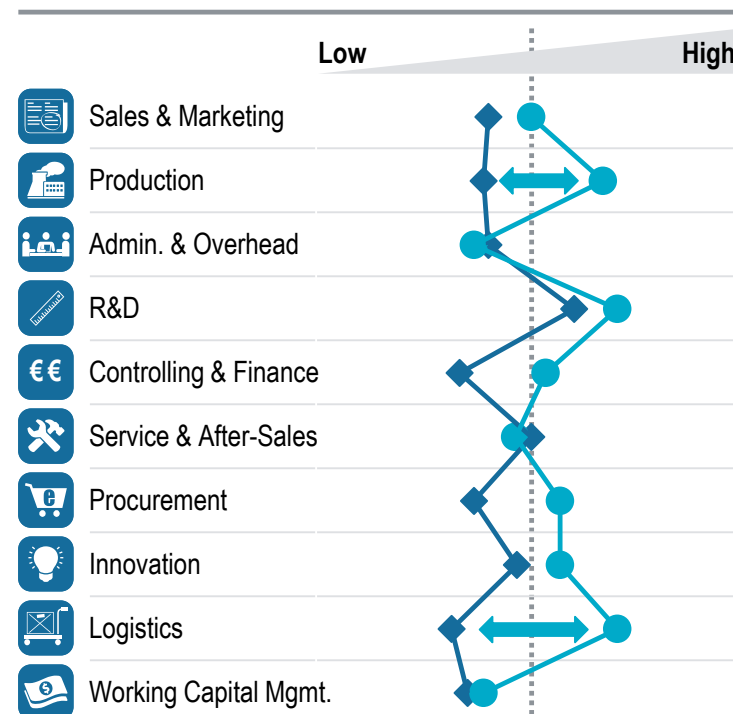
◆ Risk from digitalization being seen as synonymous with automation

● Opportunity from a new/changed positioning

↔ Call for action

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# The machinery industry is heavily challenged by the current "cooldown" and the technology change in the automotive industry

## Expert view on 2019 – Industrial Products



We expect **challenging times for Industrial Products**. The ongoing political instabilities (Brexit, trade wars) and the **FED interest rate hike** might lead to a "cooling down" of the **investment climate**. Hence, despite strong order books and currently still high – but already falling – order income levels, the **industry expects low single-digit growth rates for 2019**

- > **One of the key challenges** is driven by the **automotive industry** (as an end-customer industry) **and its trend towards electrification**. With "peak ICE" expected before 2025, the **machinery companies** are **heavily impacted** and need to **adapt their technology and product portfolio now**
- > **Automation and Digitalization** are **key levers** to further **optimize internal processes and cost position** (mainly in Procurement, Production, and Logistics) but **also offer growth opportunities**, e.g. digitally enabled, **fully automated** and **integrated solutions** offering end-to-end support
- > This **includes areas related to IoT** as well as **Service and After-Sales** (e.g. predictive maintenance). Machinery companies need to **build up software competencies, collaborate with the right external partners** and develop **new digital offerings** (in the most pragmatic way)
- > Nevertheless, the **increasing unpredictability of demand** also calls for a proper contingency plan to be able to right-size and relocate capacities in time



**Sven  
Siepen**

Senior Partner

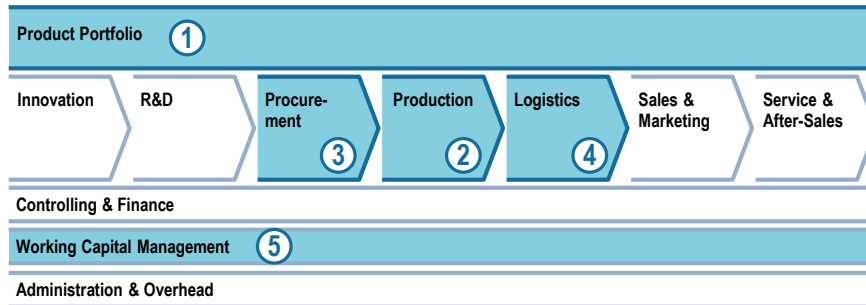


Head of Global Capital  
Goods Practice (Machinery  
and Plant Engineering,  
Energy Equipment)





















# In Industrial Products, Product Portfolio has highest priority in the value chain – Top lever: Application of commercial procurement levers




Value chain priorities and top 10 planned levers for 2019

## Value chain priorities



## Top 10 levers

- |     |   |  |      |  |   |
|-----|---|--|------|--|---|
| I   |  Application of commercial procurement levers                |    | VI   |  Optimization of the global production network  |    |
| II  |  Development of a future-proof product/service portfolio    |   | VII  |  Optimization of network and management  |   |
| III |  Efficiency improvements in Production                     |  | VIII |  Development of sustainable, profitable service/ after-sales expertise and establishment of a target-oriented service organization and management |  |
| IV  |  Customer-focused optimization of product/service features |  | IX   |  Identification of growth opportunities   |  |
| V   |  Optimization of inventories in the supply chain           |  | X    |  Optimization of product architecture and use of platform/modular concepts  |  |

 Value chain priorities of industry     Ranking of value chain segments     Trend compared to 2018



# ~2/3 of leaders in Industrial Products confirm the need for functions to reposition – Highest potential in Controlling, Procurement & Logistics

## Digitalization: Risks and opportunities

### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



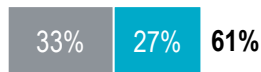
### Opportunities



My industry is changing permanently as a result of disruptive forces (e.g. electrification, the sharing economy, digitalization)



This gives rise to completely new tasks for some corporate functions



New technologies enable not only efficiency improvements but improvements in effectiveness also



This gives corporate functions the chance to add value for the company in terms of both efficiency and effectiveness



If corporate functions **spot the opportunities and exploit them**, they will be able to position themselves as **value generators** in the company



■ = Agree    ■ = Agree strongly

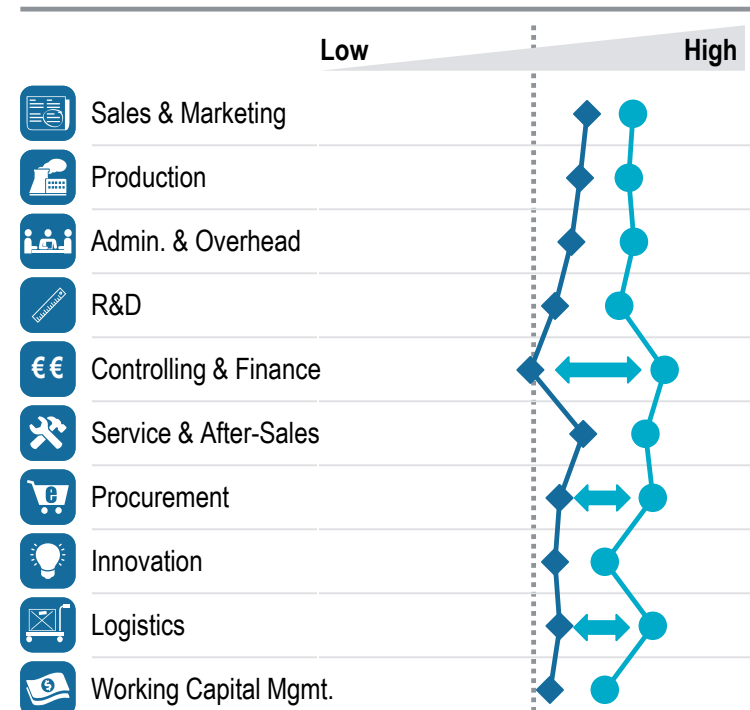
◆ Risk from digitalization being seen as synonymous with automation

● Opportunity from a new/changed positioning

↔ Call for action

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# The cost pressure on the operations functions in Chemicals/Pharma will trigger numerous cost reduction programs in 2019

## Expert view on 2019 – Chemicals/Pharma



The **cost pressure** in both industries, **Chemicals and Pharmaceuticals**, is **significantly increasing** in comparison to recent years. The reasons are very different, but the result is the same – an **intensified focus** on **efficiency**, **effectiveness** and **adequacy** will trigger initiatives like:

- > **Systematic challenging** of the existing **product portfolio** to reduce **complexity** on **all value-add levels** from raw materials to finished product. This also includes the **challenging** of **make-or-buy status** to reduce complexity or to optimize asset utilization
- > Critical **review** of **site consolidation options** to **reduce structural costs** and **reduce complexity/costs without jeopardizing the strategic core elements** (global footprint, proximity to key markets, etc.) needed for **adequate market access**
- > Leveraging **digital technology** for the **next wave** of **efficiency improvements** mainly on **site/plant level** in addition to the traditional agile performance improvement programs
- > Actively driving **end-to-end supply chain thinking** in a status **beyond individual pilots** to generate a **visible impact** on **supply chain performance**



**Martin Erharter**

Senior Partner

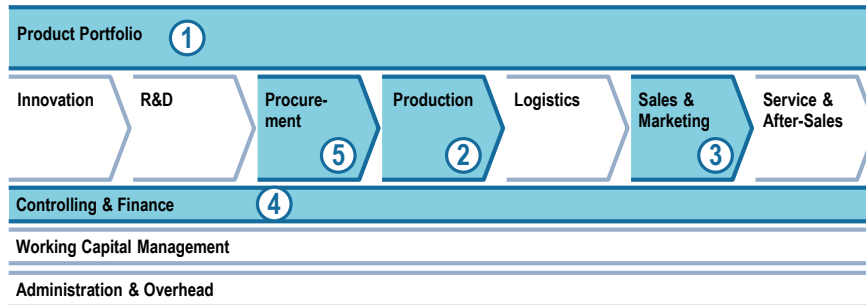


Global Chemicals &  
Pharma Practice





















# In Chemicals/Pharma, Product Portfolio has highest priority in the value chain – Top lever: Development of a future-proof portfolio




Value chain priorities and top 10 planned levers for 2019

## Value chain priorities



## Top 10 levers

- |     |   |   |  |      |   |   |   |
|-----|---|---|--|------|---|---|---|
| I   |    | Development of a future-proof product/service portfolio |    | VI   |    | Optimization/efficiency improvement of back-office services, incl. through digitalization |    |
| II  |   | Optimization of network and management                  |   | VII  |   | Customer-focused optimization of product/service features                                 |   |
| III |  | Application of commercial procurement levers            |  | VIII |  | Improvements in sales and marketing effectiveness   |  |
| IV  |  | Efficiency improvements in Production                   |  | IX   |  | Identification of growth opportunities  |  |
| V   |  | Optimization of indirect costs                          |  | X    |  | Improvement of performance and efficiency in Service                                      |  |

 Value chain priorities of industry     Ranking of value chain segments     Trend compared to 2018

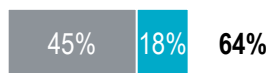
# >80% of leaders in Chemicals/Pharma confirm the need for functions to reposition – Highest potential in Sales & Mktg., R&D, Innovation

## Digitalization: Risks and opportunities

### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



### Opportunities



My industry is changing permanently as a result of disruptive forces (e.g. electrification, the sharing economy, digitalization)



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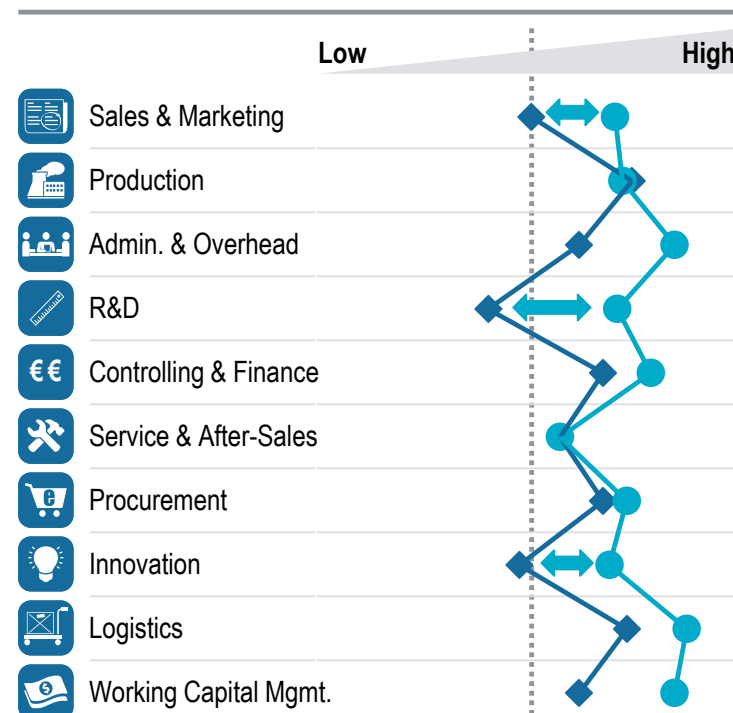
◆ Risk from digitalization being seen as synonymous with automation

● Opportunity from a new/changed positioning

↔ Call for action

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# Further growth of e-commerce is THE challenge for retailers – CG producers will have to cope with millennials and B2C approaches

## Expert view on 2019 – Consumer Goods and Retail (CGR)



**E-commerce is expected to double in scale within the next five years.** This development will be accelerated by ongoing digitalization of key processes at the customer frontline and in the backyards of production and supplier management. CG producers will be challenged in addition by the **growing importance of millennial customers** and their respective consumer preferences

- > E-commerce has given rise to highly efficient online traders (among others: Amazon, Zalando, ...) with **superior and data-driven category management capabilities in real time** – legacy retailers will be increasingly under pressure with a view to omni-channel management and overall cost efficiency
- > Growing e-commerce supported by platform solutions is facing a **growing logistics challenge** in the last mile to the consumer. The key question for retailers and CG producers alike is how to efficiently set up fulfilment for online orders
- > Advanced communication possibilities through social media open up **new ways of target group oriented marketing and sales setup**. A growing B2C orientation of so far pure-play B2C operators will result from this
- > The budgets of the millennial generation are growing with increasing age and the fundamentally different consumer preferences they have in some cases will make many CG producers rethink their **product portfolio strategy**



**Matthias Hanke**

Senior Partner

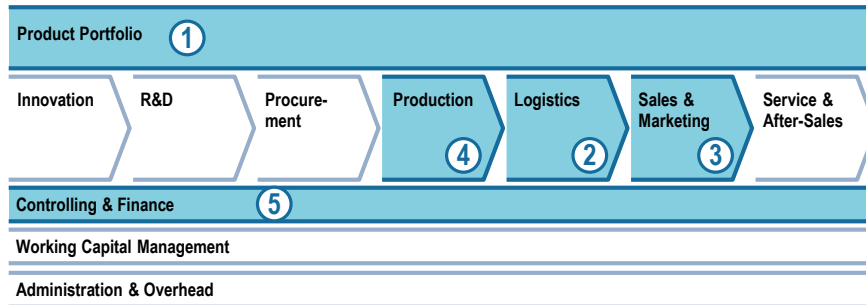


Central European Head of  
Consumer Goods & Retail  
Competence Center

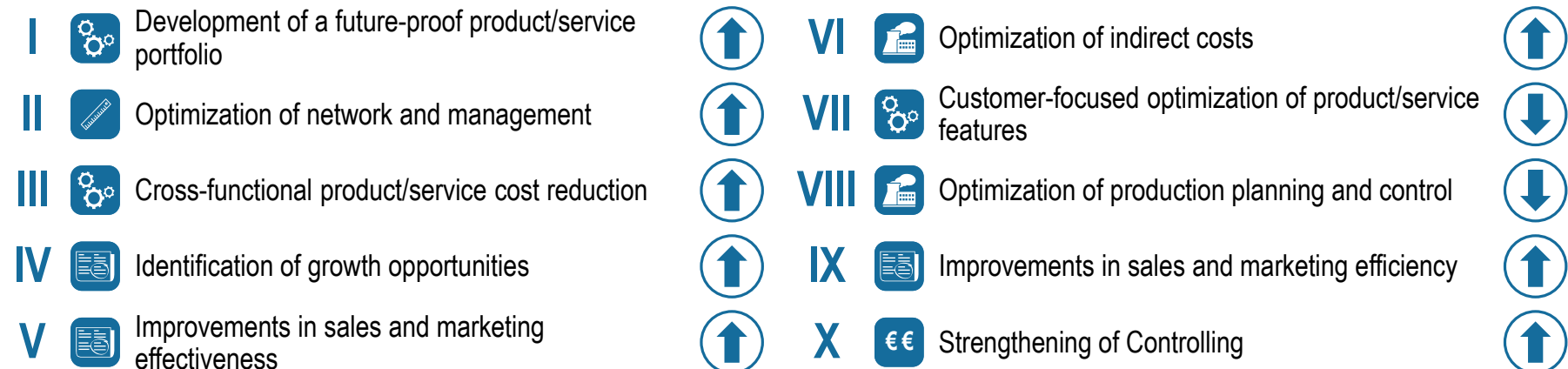
# In CG and Retail, Product Portfolio has highest priority – Top lever: Development of a future-proof product/service portfolio




Value chain priorities and top 10 planned levers for 2019

## Value chain priorities



## Top 10 levers



 Value chain priorities of industry     Ranking of value chain segments     Trend compared to 2018

# ~80% of leaders in CG & Retail confirm the need for functions to reposition – Highest potential in Controlling, Service and Logistics

## Digitalization: Risks and opportunities

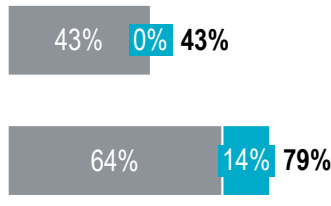
### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



### Opportunities



My industry is changing permanently as a result of disruptive forces (e.g. electrification, the sharing economy, digitalization)



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■ = Agree

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◆ Risk from digitalization being seen as synonymous with automation

● Opportunity from a new/changed positioning

↔ Call for action

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# As growth slows overall, IT and tech will need to strengthen growth segments while continuously automating operations

Expert view on 2019 – Industrial Services and IT (focus: IT, software and technology)



- > The general market will **cool down overall**, with signs already visible in **Q4/18 figures from tech leaders** – 2019 growth will see significant differences among sub-segments. As seen at CES, the **main growth areas** continue to revolve around **5G, AR/VR, AI, autonomous vehicles, surveillance and IoT**
- > In **IT services**, cost pressure remains high and requires IT service providers to continuously work on **delivery automation**, e.g. in IT operations and service provisioning. With increasing automation via **AI-driven platforms**, however (e.g. data center operation, incident resolution, testing, cyber threat intelligence), the price advantages of **global sourcing** become **less relevant** while smart location strategies with regard to energy and connectivity become more dominant
- > **SW market segments** continue to be driven by **cloudification/XaaSification** with growth areas in **corporate automation, advanced analytics and AI**. Sector innovation strongly driven by **young companies**, applying business models with XaaS metrics to formerly people-driven cost structures, **reshaping industry segments**
- > The **Industrial IoT markets** are **coming of age**, increasing platform economics dominate the quest for standards – **established large players** have caught up via **business model transformation** but need to keep pace on innovation



**Carsten  
Rossbach**

Senior Partner



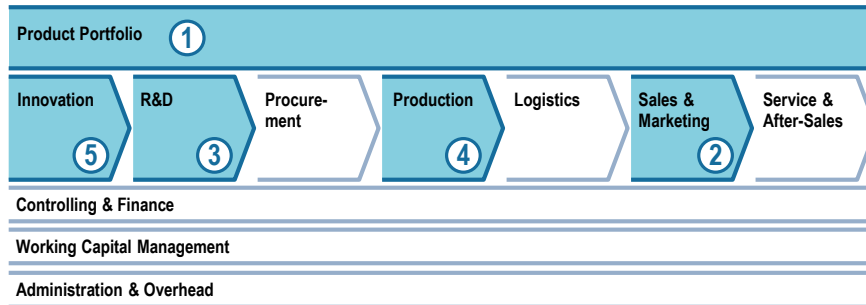
Responsible Partner for  
Central Europe  
Telecommunications,  
Technology and IT



# In Industrial Serv. and IT, Product Portfolio has highest priority in the value chain – Top lever: Customer-focused optimization of features

Value chain priorities and top 10 planned levers for 2019

## Value chain priorities



## Top 10 levers

- I Customer-focused optimization of product/service features
- II Cross-functional product/service cost reduction
- III Improvements in sales and marketing effectiveness
- IV Development of a future-proof product/service portfolio
- V Optimization of product architecture and use of platform/modular concepts
- VI Optimization of product development process
- VII Efficiency improvements in Production
- VIII Identification of growth opportunities
- IX Optimization of back-office services
- X Improvements in sales and marketing efficiency

Value chain priorities of industry    Ranking of value chain segments

# Only ~40% of leaders in Industrial Services and IT see the need for functions to reposition – Highest potential in R&D and Innovation

## Digitalization: Risks and opportunities

### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



### Opportunities



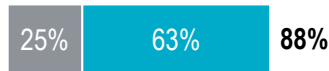
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This gives rise to completely new tasks for some corporate functions



New technologies enable not only efficiency improvements but improvements in effectiveness also



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◆ Risk from digitalization being seen as synonymous with automation

● Opportunity from a new/changed positioning

↔ Call for action

How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# Driven by low interest rates and regulation, an efficient operating model is more crucial than ever before

## Expert view on 2019 – Financial Services



- > In times of **low interest rates** and **increasing regulation efficiency is key** – this is true now more than ever in the Financial Services industry
- > At the front end, **optimization and streamlining of the product portfolio** from a client-centric perspective is necessary
- > **Digital end-to-end optimization of processes** leads to faster execution and fewer errors in further processing
- > In addition to IT, **staff is still the biggest cost driver** – its efficient use determines the long-term profitability of operations
- > **Changes in the business model** towards open banking solutions require the **efficient control of partners** – while occupying the customer interface remains the critical success factor
- > The **financial and control processes** are subject to **significant changes** – and **digitalization of the interface to supervision** plays a decisive role
- > To create a single source of truth on data, **far-reaching digitalization of the value chain** is necessary



**Markus Strietzel**

Senior Partner

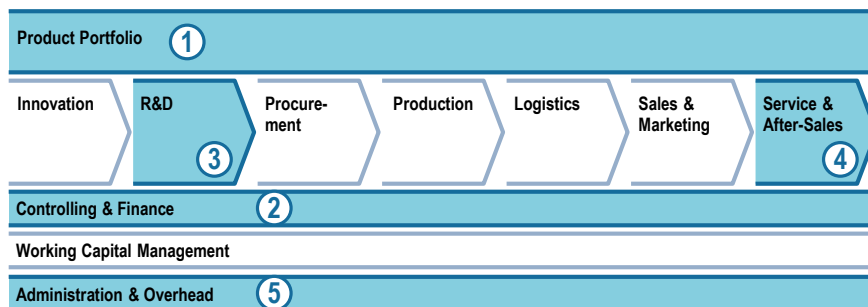


Key Partner in Financial Services Competence Center, Head of Central Europe FS

# In Financial Services, Product Portfolio has highest priority in the value chain – Top lever: Customer-focused optimization of features

Value chain priorities and top 10 planned levers for 2019

## Value chain priorities



## Top 10 levers

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>I  Customer-focused optimization of product/service features</li> <li>II  Optimization of network and management</li> <li>III  Optimization of staffing costs</li> <li>IV  Streamlining of the product/service portfolio</li> <li>V  Improvement of service sales and go-to-market</li> </ul> | <ul style="list-style-type: none"> <li>VI  Development of a future-proof product/service portfolio</li> <li>VII  Improvements in sales and marketing effectiveness</li> <li>VIII  Optimization/efficiency improvement of back-office services, incl. through digitalization</li> <li>IX  Optimization of product architecture and use of platform/modular concepts</li> <li>X  Price optimization of spare parts and services</li> </ul> |
|--|--|

 Value chain priorities of industry     Ranking of value chain segments

# ~80% of leaders in Financial Services confirm the need for functions to reposition – Highest potential in Service, Procurement and WCM

## Digitalization: Risks and opportunities

### Risks



For some corporate functions, an exclusive focus on efficiency poses considerable risks because digitalization is seen as synonymous with automation ("whatever can be automated will be automated")



Corporate functions must therefore reposition themselves and redefine their value add for the company as a whole



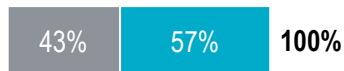
### Opportunities



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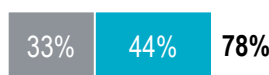
New technologies enable not only efficiency improvements but improvements in effectiveness also



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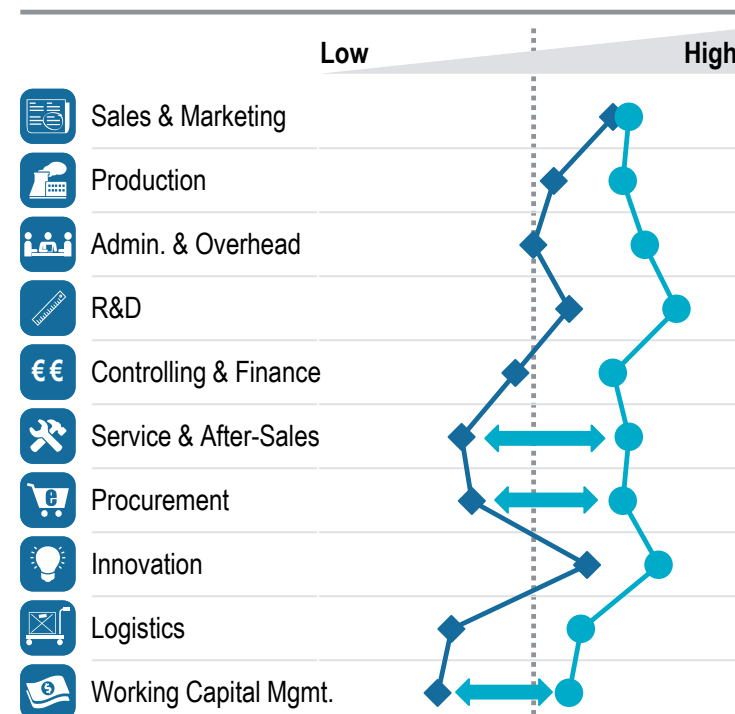
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● Opportunity from a new/changed positioning

↔ Call for action

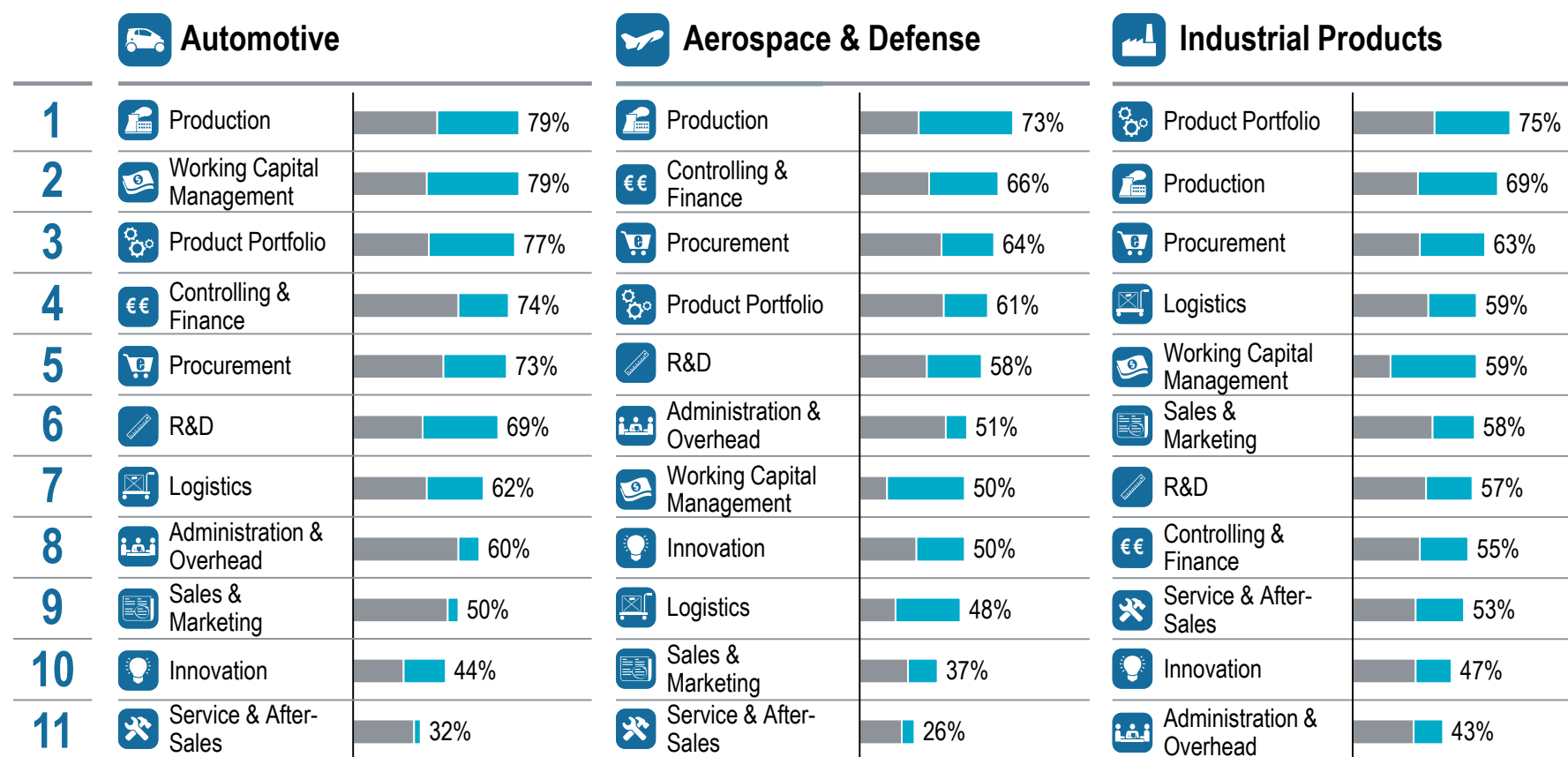
How do you assess the **risk from digitalization being seen as synonymous with automation** in the following functions?

How do you assess the **opportunity from a new/changed positioning** in the following functions?



# Summary of priorities across industries

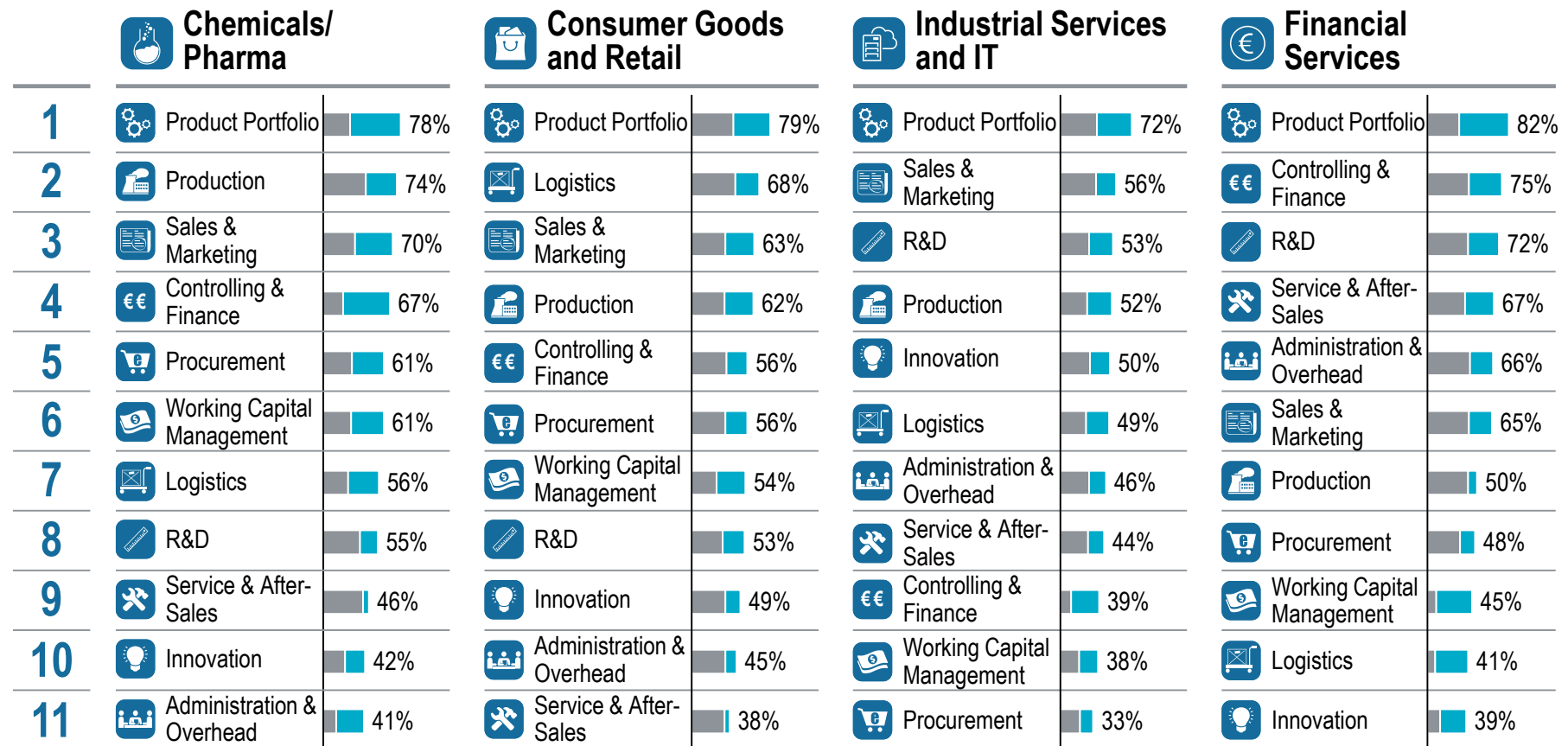
## Priorities in 2019 by industry (1/2)



■ = Certain    ■ = Very certain

# Summary of priorities across industries

## Priorities in 2019 by industry (2/2)



■ = Certain    ■ = Very certain

## C. Recommendation





# We recommend using the results of the Operations Efficiency Radar to challenge the organization and prepare for a potential crisis

## Recommendation

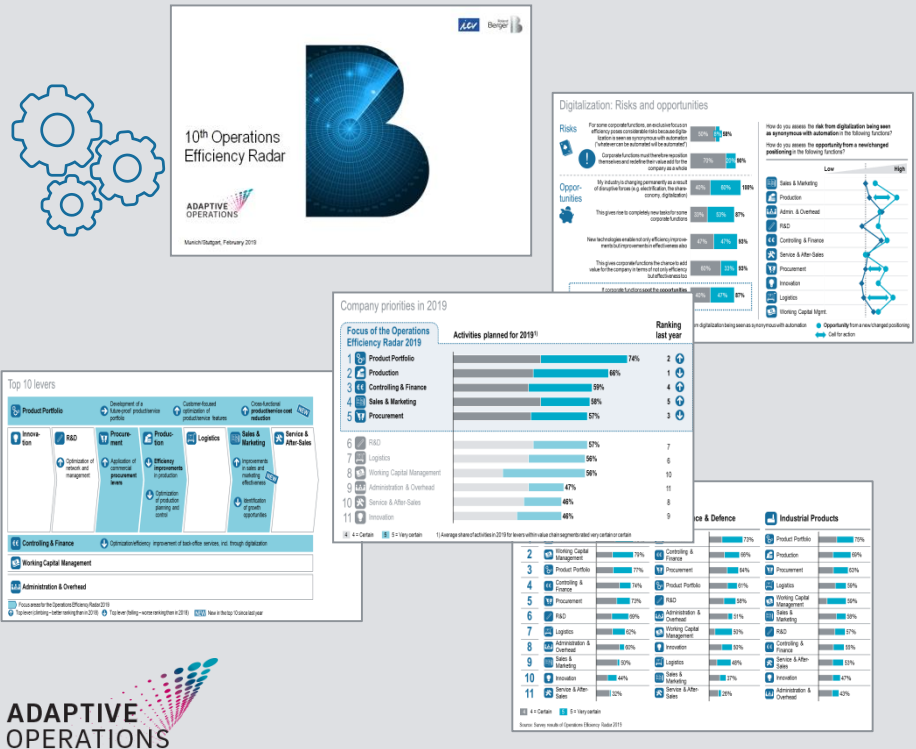


- » First consequences of the fragile environment are already visible in a number of indicators
- » Likewise, the 10th Operations Efficiency Radar shows that around 50% of the participants expect an economic downturn for 2019 – But mixed picture by industry
- » Therefore, we recommend using the results of the 10th Operations Efficiency Radar to
  - 1 Challenge priorities, levers and budgets in your organization &
  - 2 Review your early warning systems and at least prepare for a potential downturn in your industry

# Company leaders should use the 10th Operations Efficiency Radar to challenge priorities throughout 2019

Leverage study results

## Operations Efficiency Radar



### CEO/CFO

- > Challenge functional priorities and budgets
- > Synchronize priorities and budgets across functions
- > Finetune and prioritize corporate budget and investments

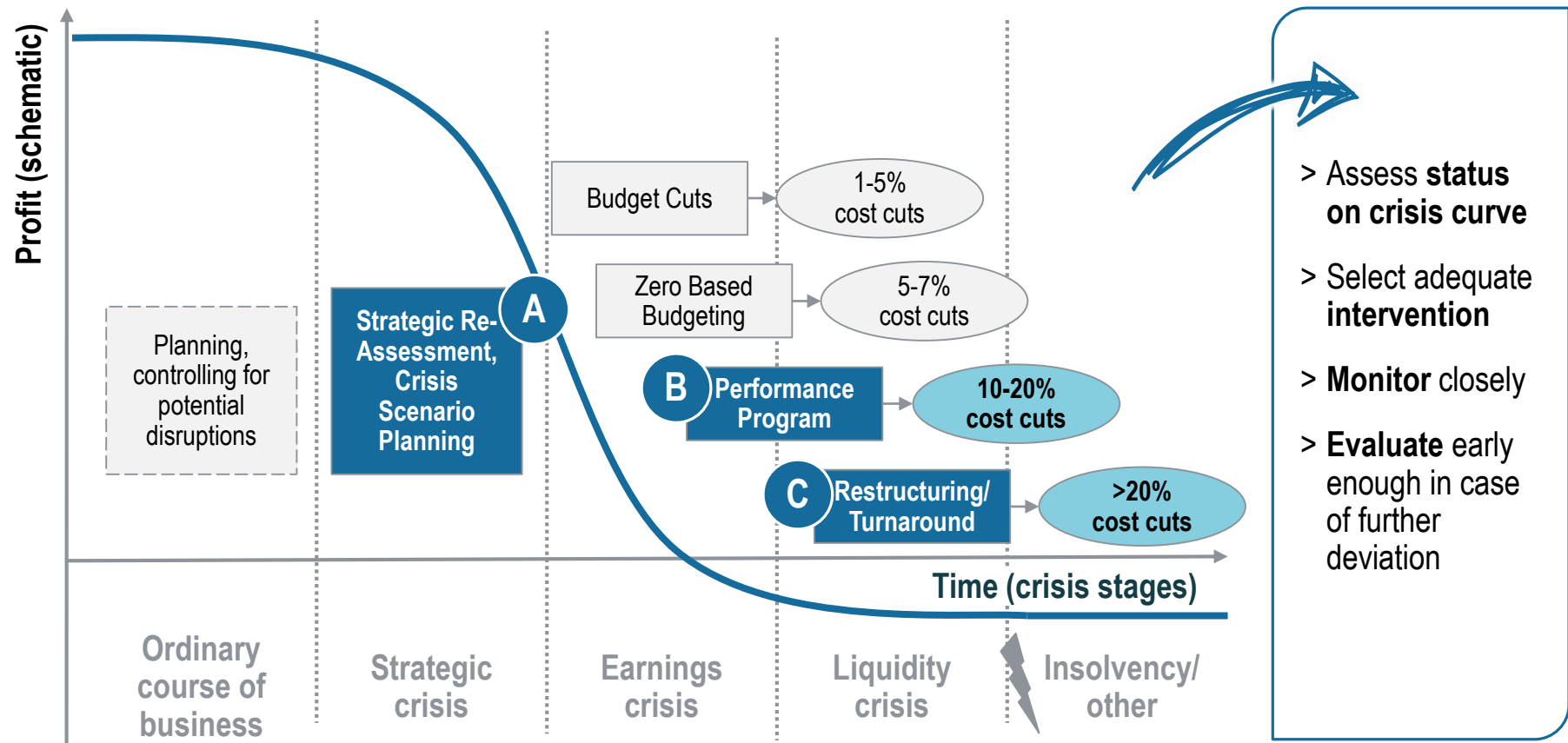


### Functional heads

- > Benchmark functional trends
- > Set functional priorities
- > Align functional budget

In addition, company leaders should review their early warning systems and consider three crisis preparation options

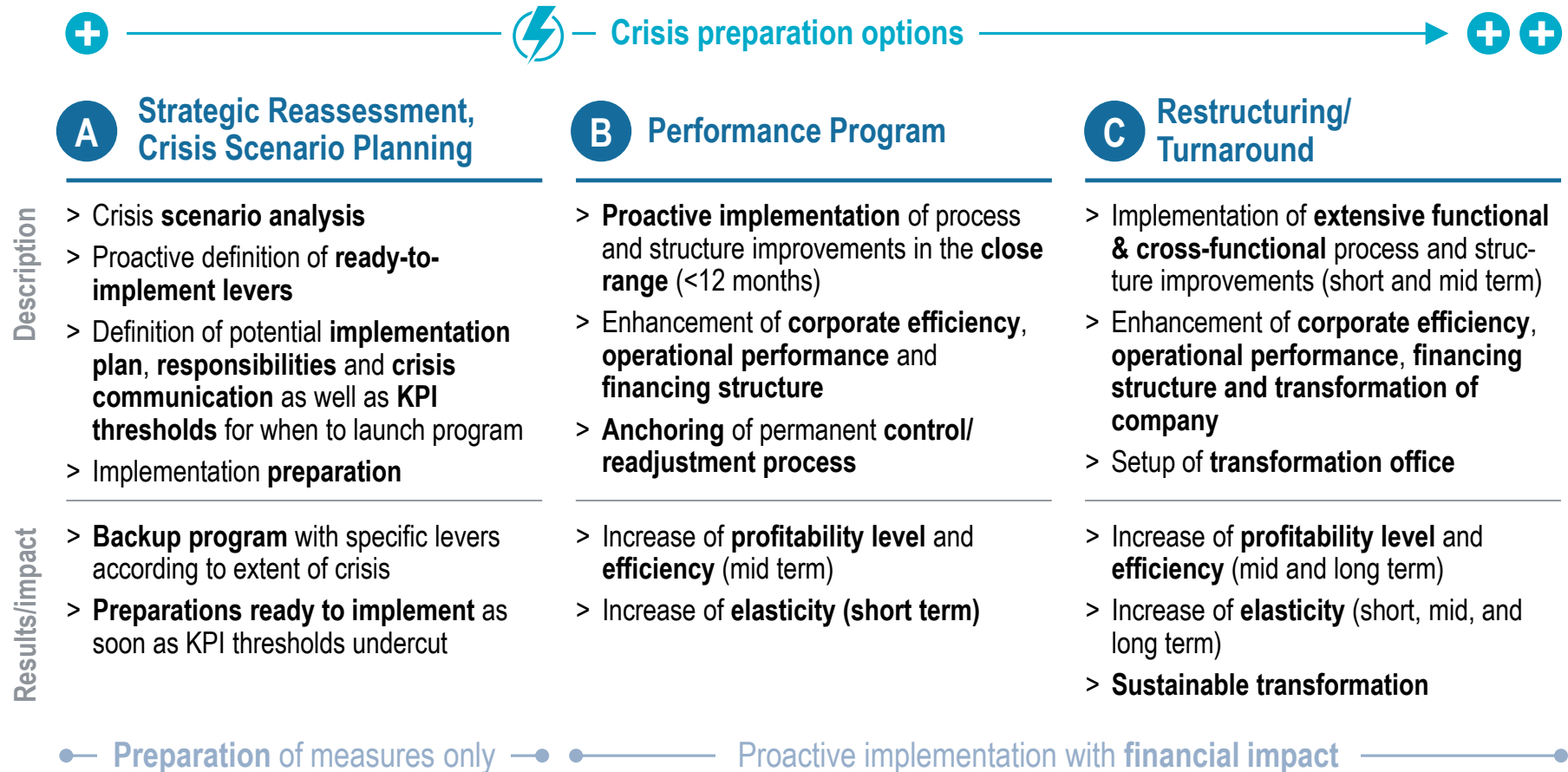
Roland Berger approaches for crisis preparation



- > Assess **status on crisis curve**
- > Select adequate **intervention**
- > **Monitor** closely
- > **Evaluate** early enough in case of further deviation

# Crisis preparation ranges from having backup programs ready to implement to holistic performance programs for the company

Details on crisis preparation approaches



## D. Study design and our contact details

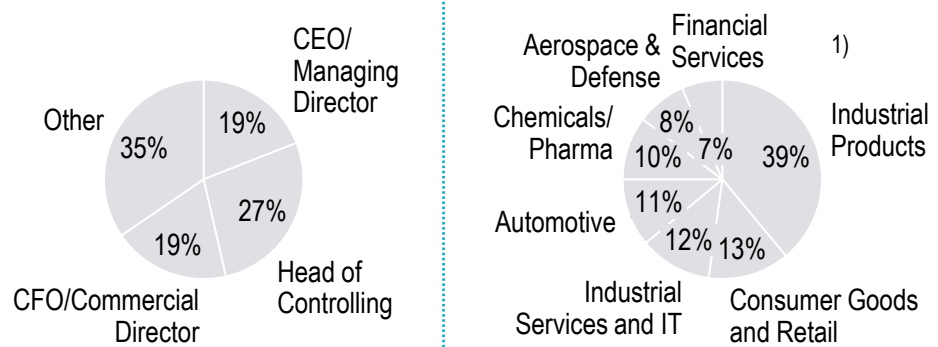


# The Operations Efficiency Radar addresses CEOs/CFOs and functional heads

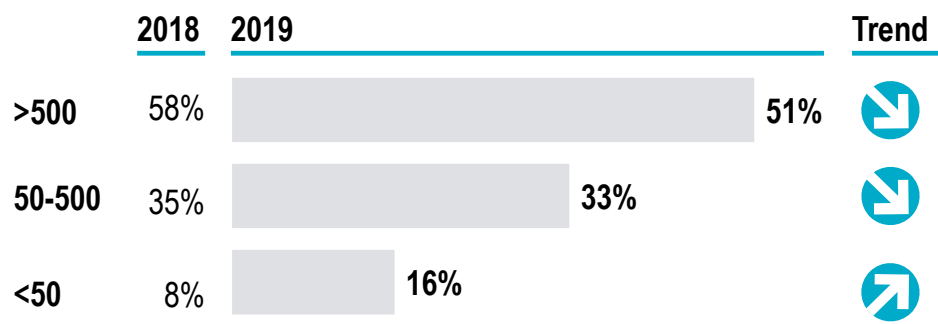
Focus of and response to the questionnaire for the 10th edition

<b>Target companies</b>	<ul style="list-style-type: none"> <li>&gt; <b>Manufacturing</b> companies and <b>service providers</b></li> <li>&gt; SMEs and large companies</li> </ul>
<b>Target group</b>	<ul style="list-style-type: none"> <li>&gt; <b>CFO/Commercial Director</b></li> <li>&gt; <b>Functional heads, e.g. Controlling, Procurement</b></li> </ul>
<b>Approach</b>	<ul style="list-style-type: none"> <li>&gt; <b>Quick survey</b> via e-mail/online tool in <b>DACH region</b></li> <li>&gt; Predefined <b>levers to select</b></li> <li>&gt; Levers based on the experience of the ICV and Roland Berger</li> </ul>
<b>Period</b>	> <b>November 2018</b>
<b>Participants</b>	> <b>More than 300 respondents</b> in leadership roles

## Function and industry of study respondents



## Study respondents' company size – 2017 revenues [EUR m]

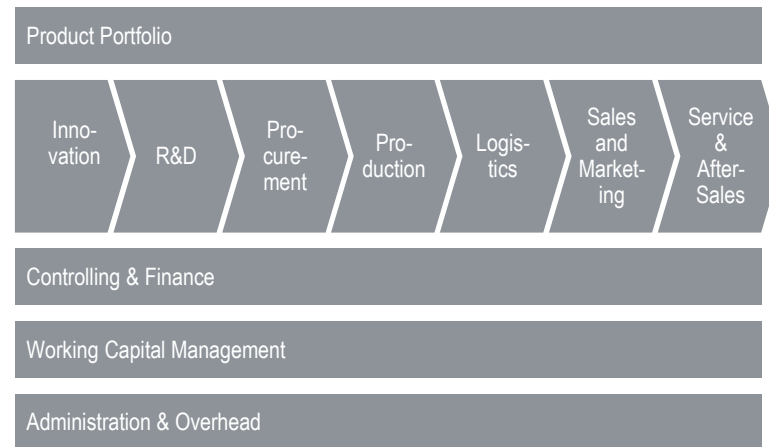


1) The new GDPR provisions meant that about 30% of responses could not be allocated to a specific industry

# The study builds on levers along the value chain – Hot topic for the radar 2019: Digitalization in corporate functions

## Study design

### Value chain



**The study**

### Assessing the set of levers used along the value chain

Corporate Function	Activity	2019	2020	2021	2022	2023	2024	2025
Product Portfolio	1. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	2. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	3. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	4. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	5. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
Controlling & Finance	1. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	2. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	3. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	4. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	5. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
Working Capital Management	1. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	2. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	3. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	4. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	5. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
Administration & Overhead	1. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	2. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	3. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	4. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							
	5. Welche Ressourcen werden bis 2025 in Ihren Bereichen?							

**Activity on the levers in 2019:**  
Are you planning any special activities to improve your use of the levers in 2019?

## Hot topic analysis for 2019: Digitalization in corporate functions along the value chain

What are the risks that are inherent in digitalization being viewed as synonymous with automation? Will the corporate functions manage to reposition themselves and redefine their value add for the company as a whole?



# Your contacts



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Senior Partner  
Co-Head of Operations

**Roland Berger GmbH**

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**FH-Prof. Dr. Heimo  
Losbichler**

Chairman of the Board

**International Association of  
Controllers**

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**Carmen Zillmer**

Managing Director  
Member of the Board

**International Association of  
Controllers**

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fabian.maier@rolandberger.com



**Dominik Bronstering**

Senior Consultant

**Roland Berger GmbH**

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Mobile: +49 160 744 8145  
dominik.bronstering@rolandberger.com



As a leading strategy consultancy in the operations and industrial sectors, Roland Berger has published several studies on hot topics

**Operations**

**Automotive**

**Aerospace & Defense**

**Industrial Products**

**Chemicals/Pharma**

**Consumer Goods and Retail**

**Industrial Services and IT**

**Financial Services**

**Economic trends**

## Appendix 1: Results of levers per value chain segment



# Growth and customer focus remain important issues for respondent companies

## Individual levers for the Operations Efficiency Radar – Product Portfolio

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Development of a future-proof product/service portfolio (existing and/or new products, adjustment of products/markets/prices/volumes, vertical growth/consolidation)	36% (Certain) + 47% (Very certain) = 83%	→
2	Customer-focused optimization of product/service features (removing/adding functions)	41% (Certain) + 37% (Very certain) = 78%	→
3	Cross-functional product/service cost reduction (consideration of all costs in the value chain)	34% (Certain) + 37% (Very certain) = 71%	↑
4	Streamlining of the product/service portfolio (negative margin, complexity drivers, etc.)	35% (Certain) + 28% (Very certain) = 63%	↓

■ Top 10 lever   ■ = Certain   ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Efficiency improvements in Production are gaining relevance – A top 10 lever alongside optimization of production planning and control

## Individual levers for the Operations Efficiency Radar – Production

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Efficiency improvements in production (continuous improvement, Kaizen, Six Sigma, etc.)	36% (Certain) + 40% (Very certain) = 76%	↑
2	Optimization of production planning and control	31% (Certain) + 37% (Very certain) = 68%	↓
3	Optimization of indirect costs (automation, centralization, in/outsourcing, etc.)	38% (Certain) + 26% (Very certain) = 64%	→
4	Optimization of value creation in Production (core competencies, make-or-buy)	38% (Certain) + 24% (Very certain) = 62%	→
5	Optimization of the global production network (products/locations)	26% (Certain) + 31% (Very certain) = 57%	→

■ Top 10 lever   ■ = Certain   ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Controlling topics continue to gain importance – Efficiency improvement of back-office services is the top lever

## Individual levers for the Operations Efficiency Radar – Controlling & Finance

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Optimization/efficiency improvement of back-office services, incl. through digitalization (budgeting, reporting, etc.)		↑
2	Strengthening of Controlling (greater transparency, controllers as business partners, centralization, etc.)		↓
3	Optimization of project costs (consultants, IT systems, new projects, etc.)		→
4	Optimization of staffing costs (overtime, headcount, etc.)		→

Top 10 lever
  = Certain
  = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Sales/marketing effectiveness and growth remain key issues for Sales & Marketing

## Individual levers for the Operations Efficiency Radar – Sales & Marketing

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Improvements in sales and marketing effectiveness (pricing policy, customer management, channel management, etc.)	41% (Certain) + 28% (Very certain) = 69%	↑
2	Identification of growth opportunities (product/technology, customers, regions, etc.)	35% (Certain) + 33% (Very certain) = 68%	↓
3	Sales push to exploit market opportunities (regaining lost customers, proactively exploiting competitors' weaknesses, etc.)	35% (Certain) + 22% (Very certain) = 57%	→
4	Improvements in sales and marketing efficiency (cross-functional reduction of other marketing costs)	38% (Certain) + 14% (Very certain) = 52%	↑
5	Optimization of corporate structures and processes, control and systems (degree of centralization, incentivization, etc.)	35% (Certain) + 15% (Very certain) = 50%	↓
6	Optimization of back-office services (promotions, marketing material, etc.)	34% (Certain) + 12% (Very certain) = 46%	↓

■ Top 10 lever   ■ = Certain   ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Commercial procurement levers have established themselves as top levers

## Individual levers for the Operations Efficiency Radar – Procurement

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Application of commercial procurement levers (price comparison, bundling, etc.)	41% (Certain) / 36% (Very certain) = 77%	→
2	Improvement of supplier management (risk management, involvement in processes, etc.)	37% (Certain) / 20% (Very certain) = 57%	→
3	Application of process levers in Procurement (e-procurement, online catalogs, etc.)	30% (Certain) / 24% (Very certain) = 54%	→
4	Development of category strategies (consideration of costs, quality, technology, availability)	34% (Certain) / 18% (Very certain) = 52%	→
5	Optimization of corporate structures and processes, procurement management and systems (degree of centralization, incentivization, etc.)	26% (Certain) / 25% (Very certain) = 51%	↑
6	Application of technical procurement levers (value analysis, material substitution, etc.)	28% (Certain) / 22% (Very certain) = 50%	↓

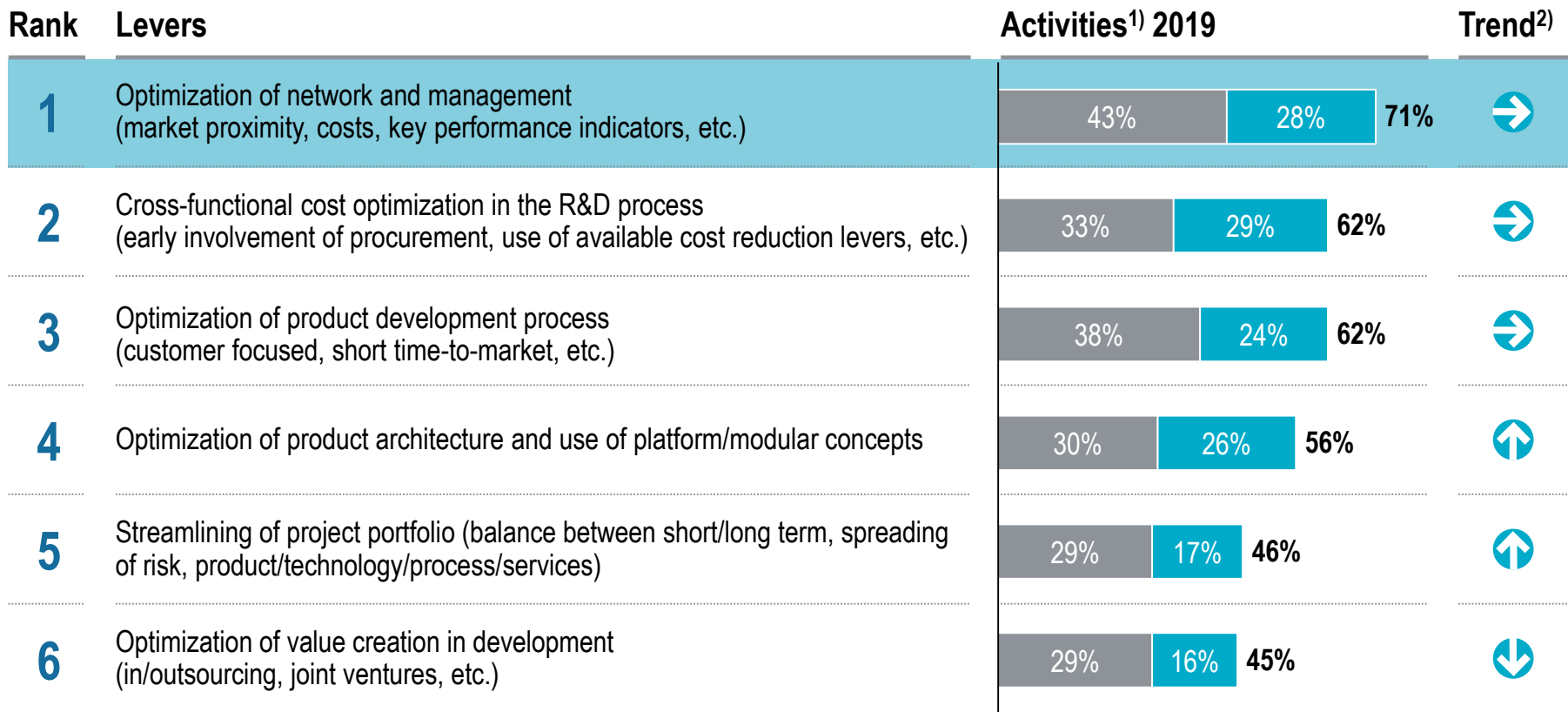
■ Top 10 lever   ■ = Certain   ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Network and cross-functional optimization remain areas of focus in R&D

## Individual levers for the Operations Efficiency Radar – R&D



■ Top 10 lever   
 ■ = Certain   
 ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year



# Logistics topics are becoming less relevant, especially warehouse cost optimization (which ranked highest of all in Logistics in 2018)

## Individual levers for the Operations Efficiency Radar – Logistics

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Integrated supply chain management (demand planning, order and inventory management, supplier management, service level differentiation, etc.)		↑
2	Optimization of transportation costs (routes, carriers, capacity utilization, delivery mode, etc.)		→
3	Optimization of inventory costs (MRP parameters, number of days' supply, cross-docking, etc.)		↑
4	Optimization of warehousing costs (locations, staffing capacity, automation, etc.)		↓

■ Top 10 lever   
 ■ = Certain   
 ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Ranking of Working Capital Management levers remains unchanged again – Inventory optimization is the area with the most activity

## Individual levers for the Operations Efficiency Radar – Working Capital Management

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Optimization of inventories in the supply chain		➔
2	Optimization of accounts receivable		➔
3	Optimization of accounts payable		➔

■ Top 10 lever   
 ■ = Certain   
 ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Levers in Administration & Overhead continue to be of lesser relevance for study respondents

## Individual levers for the Operations Efficiency Radar – Administration & Overhead

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Optimization of corporate structures and processes, control and systems (degree of centralization, process optimization, system harmonization, etc.)		➔
2	Optimization of back-office services (help desk, payroll, etc.)		➔
3	Optimization and flexing of staffing costs (in/outsourcing, working time banking, etc.)		➔
4	Optimization of other costs (seminars, maintenance, etc.)		➔

Top 10 lever
  = Certain
  = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Improvement of performance and efficiency are the most important levers in Service – Far fewer activities planned overall

## Individual levers for the Operations Efficiency Radar – Service & After-Sales

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Improvement of performance and efficiency in Service (service level performance, lean processes, international expertise, processing of inquiries, etc.)	38% (Certain) + 21% (Very certain) = 59%	↑
2	Development of sustainable, profitable Service/After-Sales expertise and establishment of a target-oriented service organization and management	32% (Certain) + 22% (Very certain) = 54%	↓
3	Improvement of service sales and go-to-market (fully exploiting the installed base, customer-focused service design, effective service network, dedicated service sales, etc.)	31% (Certain) + 17% (Very certain) = 48%	↑
4	Price optimization of spare parts and services (price differentiation, alternative payment models, etc.)	24% (Certain) + 10% (Very certain) = 34%	↑
5	Achievement of service lock-in with customers (alternative business/payment models, product & service integration, etc.)	24% (Certain) + 9% (Very certain) = 33%	↓

Top 10 lever
  = Certain
  = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

2) Change in the lever's ranking since last year

# Fewer activities are planned on the Innovation levers – Optimization of the innovation system/process ranks highly in Innovation

## Individual levers for the Operations Efficiency Radar – Innovation

Rank	Levers	Activities <sup>1)</sup> 2019	Trend <sup>2)</sup>
1	Optimization of the innovation system/process (operating model, key performance indicators, agile innovation)		↑
2	Development of a clear, transparent innovation strategy		↓
3	Creating new innovation structures (incubators, startups, corporate ventures, open innovation, co-creation)		→
4	Pushing innovations outside of the core business (radical non-core)		→

■ Top 10 lever   
 ■ = Certain   
 ■ = Very certain

1) Share of companies planning activities on the lever for 2019 (certain or very certain)

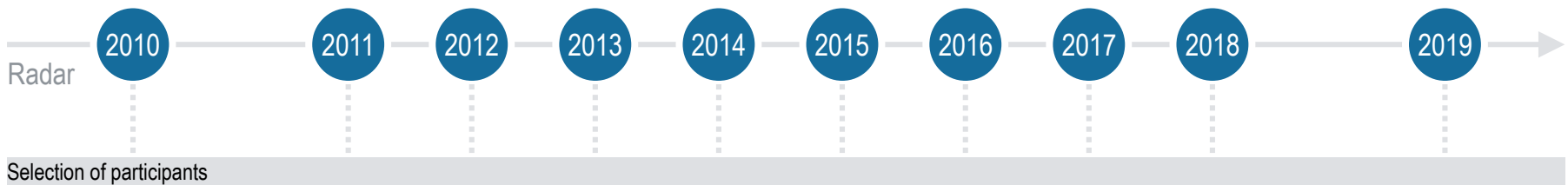
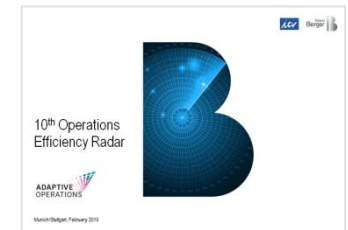
2) Change in the lever's ranking since last year

## Appendix 2: Evolution of the 10th Operations Efficiency Radar



# A success story – In the last ten years, the Operations Efficiency Radar has supported many industry leaders

## Timeline and participants



**Selection of participants**

# The Operations Efficiency Radar has provided a robust view of the priorities by function ...

## Key facts



**51**  
questions  
to be  
answered



**10**  
surveys  
conducted  
in 10 years



**7 different**  
industries  
in the  
scope



**11 corporate**  
functions  
covered and  
assessed



**One hot**  
topic  
addressed  
per year



**Record**  
participation  
in 2019 with  
**>300**  
participants



- > **More than 1 million data points**
- > **Several hot topics to cover current market trends**





... supplemented by a yearly deep dive on current hot topics

Hot topics addressed

"Quo vadis – Up- or downturn?"

Changes through digitalization

Value add through RPA and AI

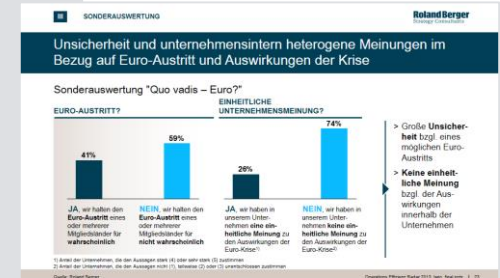
Changes through Industry 4.0

Products for the emerging markets

Impact of digitalization on the business model

"Quo vadis – Euro?"

Digitalization



Roland  
Berger

THINK:ACT

