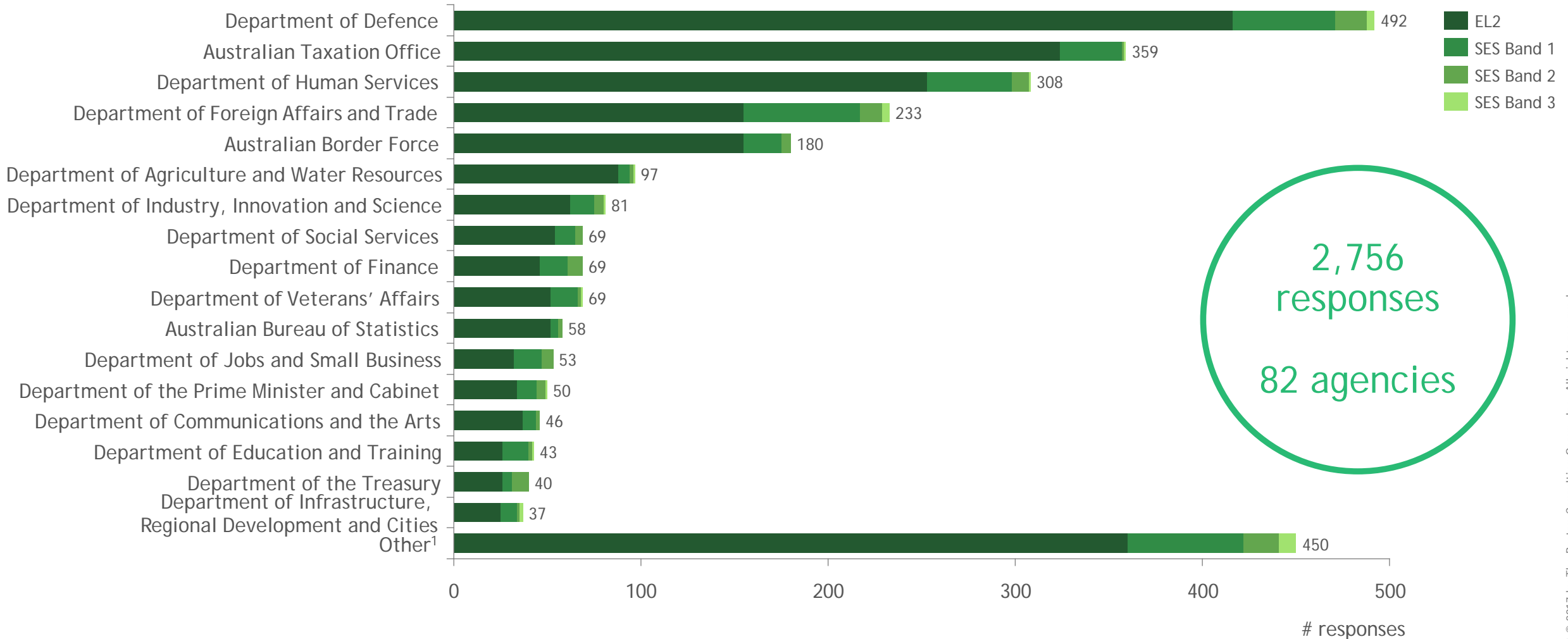
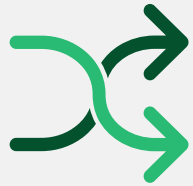


Responses were received from a wide range of agencies



1. Other covers 65 other agencies including Australian Border Force, Comcare, IP Australia, Office of the Fair Work Ombudsman, Australian Signals Directorate, APSC, Murray-Darling Basin Authority, DTA, National Library of Australia, Australian Financial Security Authority, Office of National Assessments, Commonwealth DPP, AEC, APS Review, AAT, Office of the eSafety Commissioner, Fair Work Commission, ANAO, amongst others

Respondents provided their perception of 25 megatrends, which are classified into four themes



Changing expectations

- Fiscal pressure to do more with less
- Increasing citizen expectations
- Continued demand for digital government
- Growing distrust and demand for transparency
- Rise of new media
- Unclear role of government versus private sector and non-profit/philanthropy
- Increasing power of Millennials
- Tailoring of services to local areas



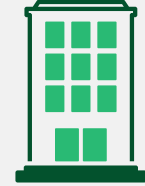
Advances of technology

- Increasingly data driven world
- More cybersecurity risks
- Rise of Artificial Intelligence & Machine Learning
- Continuing innovation imperative
- Uptake of robotics & automation



Societal and geopolitical shifts

- Ageing population
- Rise of global tech giants
- Increasing focus on risk and security
- Growth of major Asian economies
- Migration continues to drive population growth
- Growing inequality



Changing work

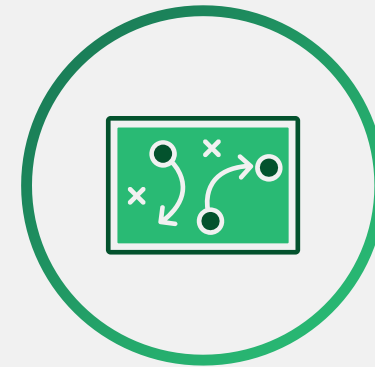
- Workforce shifting to new skillsets
- More demand for flexible working
- Increasingly multi-generational workforces
- More collaborative, iterative work approaches
- Adoption of human-centred design
- Shift from vertical product siloes to horizontal platforms

Respondents provided their perspective on the impact of each megatrend and the preparedness of APS to address it



What is the degree of impact?

Determine the degree of impact of each megatrend on the APS out to 2030; from limited impact to pervasive impact



How prepared is the APS?

Determine how prepared the APS is to address each megatrend out to 2030; from unprepared to unprepared

Key insights

The 5 most impactful trends were consistent across all seniority levels and locations

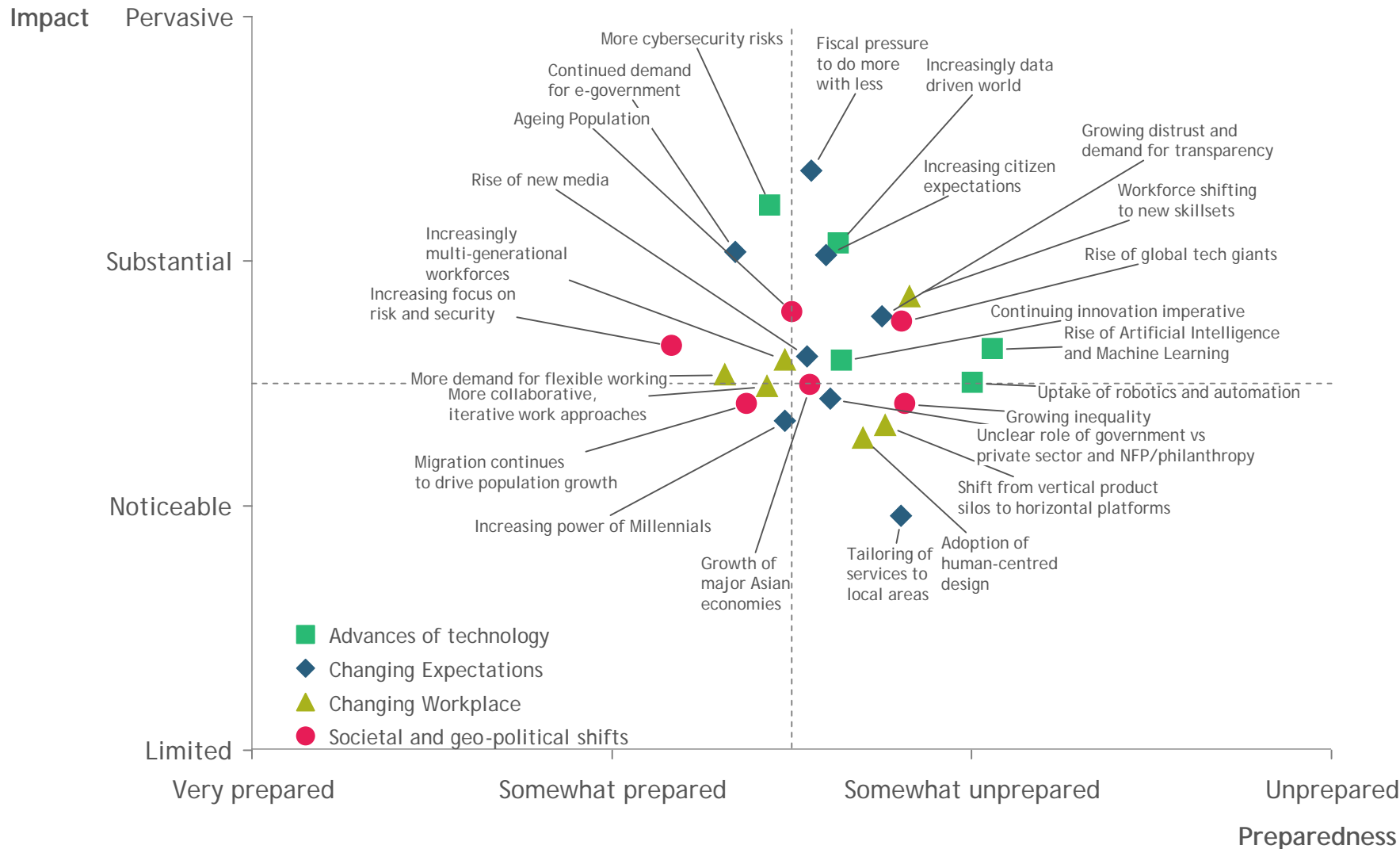
Increasing seniority of the respondent saw an increase in degree of impact and uncertainty scores across most trends¹

Respondents tended to perceive trends as more impactful if the trend was associated to their employer agency

Employees outside of the ACT saw all technology related trends as higher impact than their ACT based colleagues

1. With the exception of 'role of governments vs. private sector'

Our survey highlighted high impact trends, and those the APS is not prepared for



Top 5 megatrends scored as having the **highest impact** on the APS:

1. Fiscal pressure to do more for less
2. Cybersecurity risk
3. Data driven world
4. Increasing citizen expectations
5. Continued demand for digital government

Top 5 megatrends which the APS is **most unprepared** for:

1. Rise of artificial intelligence
2. Uptake of robotics and automation
3. Workforce shifting to new skillsets
4. Growing distrust & demand for transparency
5. Rise of global tech giants

Quotes from APS staff emphasise greatest opportunities out to 2030



“ Appropriately harnessing the vast amounts of data becoming available, to ensure policy is directed most efficiently and effectively ”

- EL2

“ Keeping experienced people while integrating new and innovative thinkers could be a significant improvement to the workforce diversity and culture ”


- SES Band 2

“ Having a more mobile, agile and flexible workforce capable of responding to need, and the government's agenda will be critical ”

- SES Band 1

“ Integrate into the local and regional communities and introduce real time feedback about community needs and expectations ”

- EL2

A person in a dark suit and tie is shown from the chest down, balancing three wooden blocks on their left hand. The background is dark, and the lighting highlights the person's hand and the blocks.

Quotes from APS staff emphasise greatest risks out to 2030

“ Cyber security risks means that the work and reputation of the APS can be threatened too readily ”

- EL2

“ Failures by agencies to protect public data could see withdrawal of public support for increased automated services ”

- SES Band 1

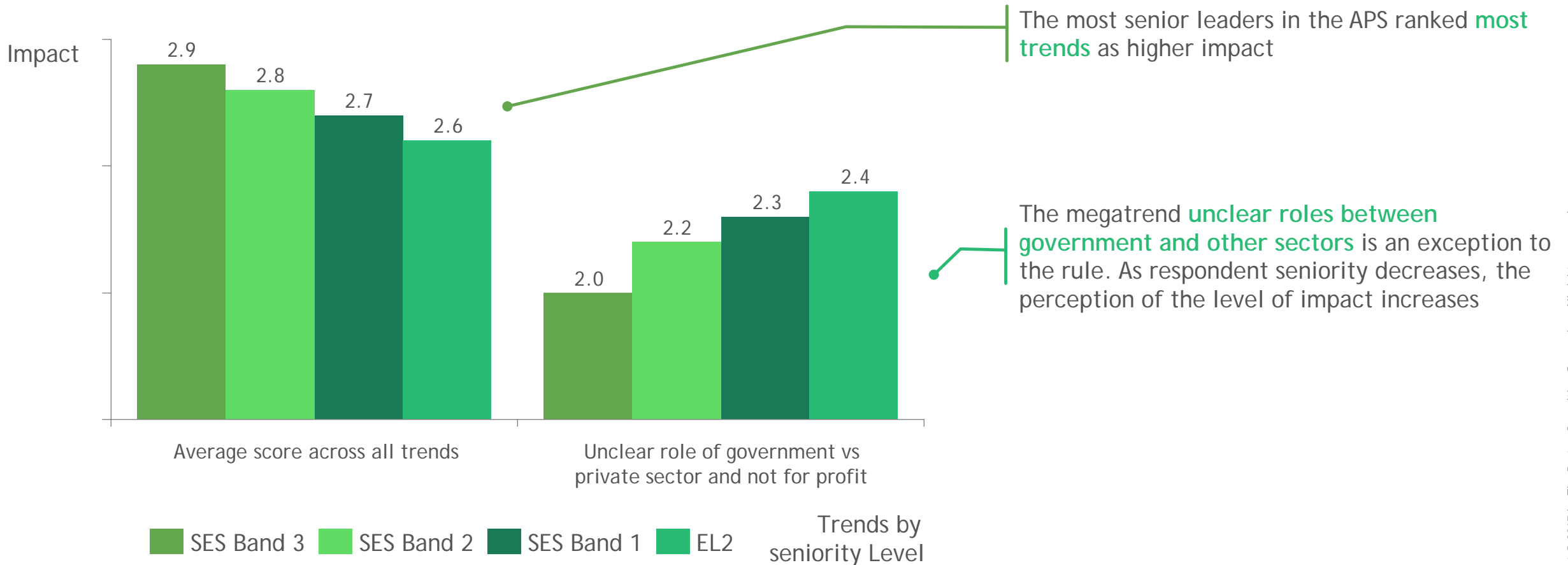
“ Skills shortages, particularly the ability to attract true technical expertise to deliver innovative solutions for the community ”

- SES Band 2

“ It will be the pace of the impacts and our inability to respond in a timely way that is our greatest challenge ”

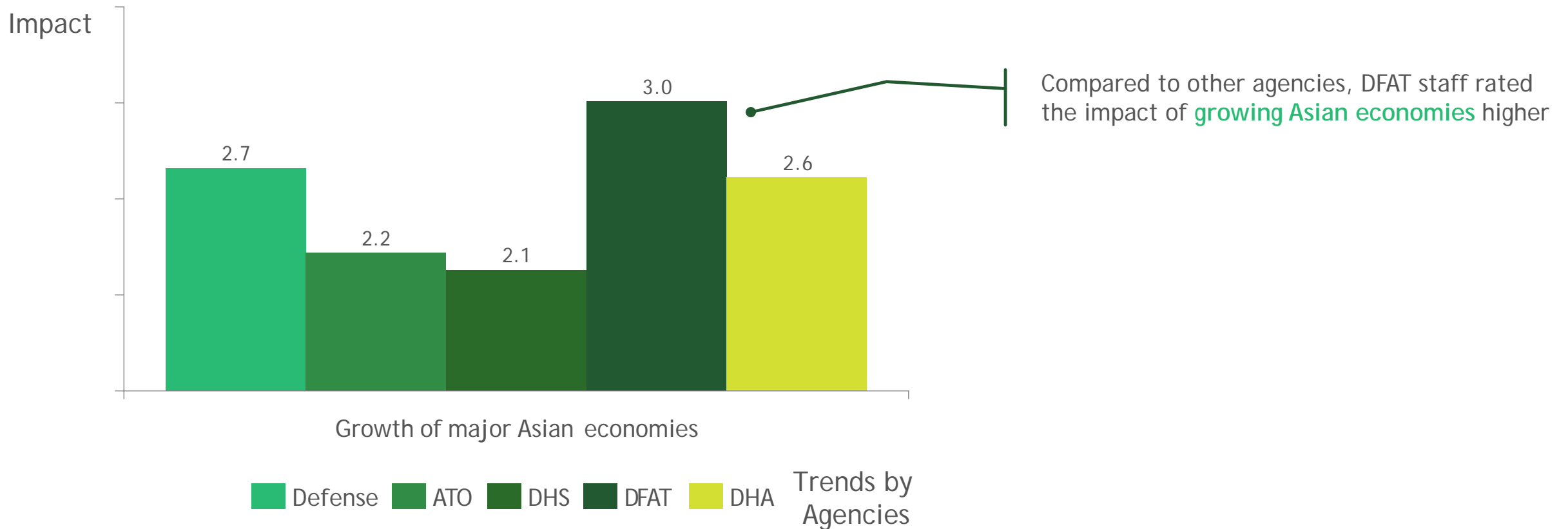
- EL2

For most trends, more senior respondents gave higher impact scores



Note: Quantitative impact scores should be interpreted as: 1 - Limited impact; 2 - Noticeable impact; 3 - Substantial impact; 4 - Pervasive impact

Agencies tend to over-index on impact of trends associated with their area of work

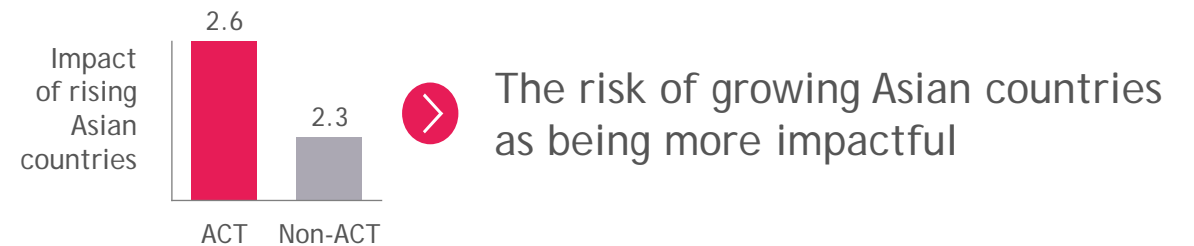
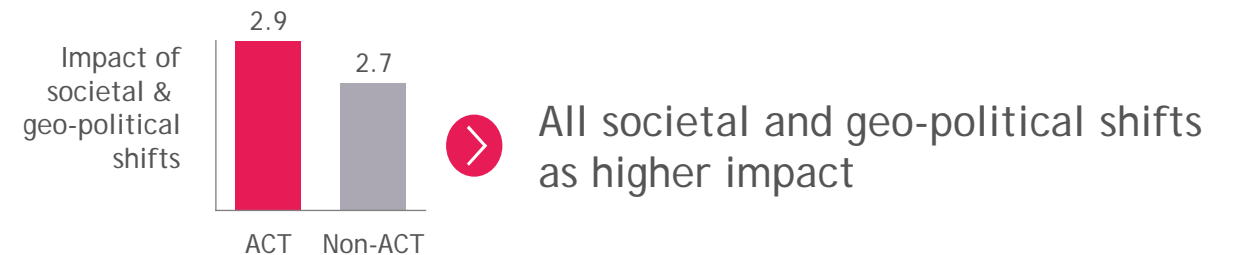
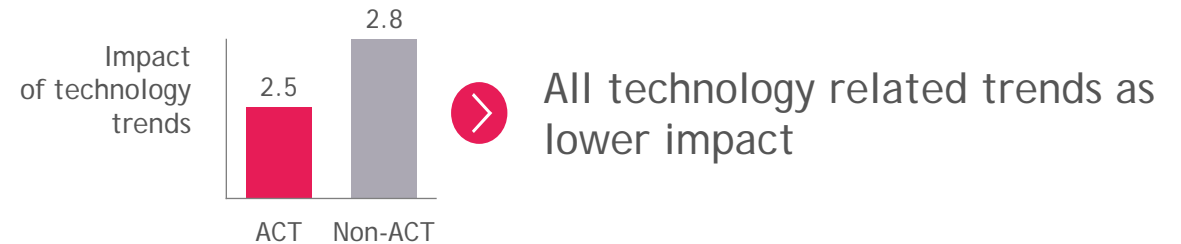


Note: Quantitative impact scores should be interpreted as: 1 - Limited impact; 2 - Noticeable impact; 3 - Substantial impact; 4 - Pervasive impact

Survey indicates some differences in perception between ACT and non-ACT respondents

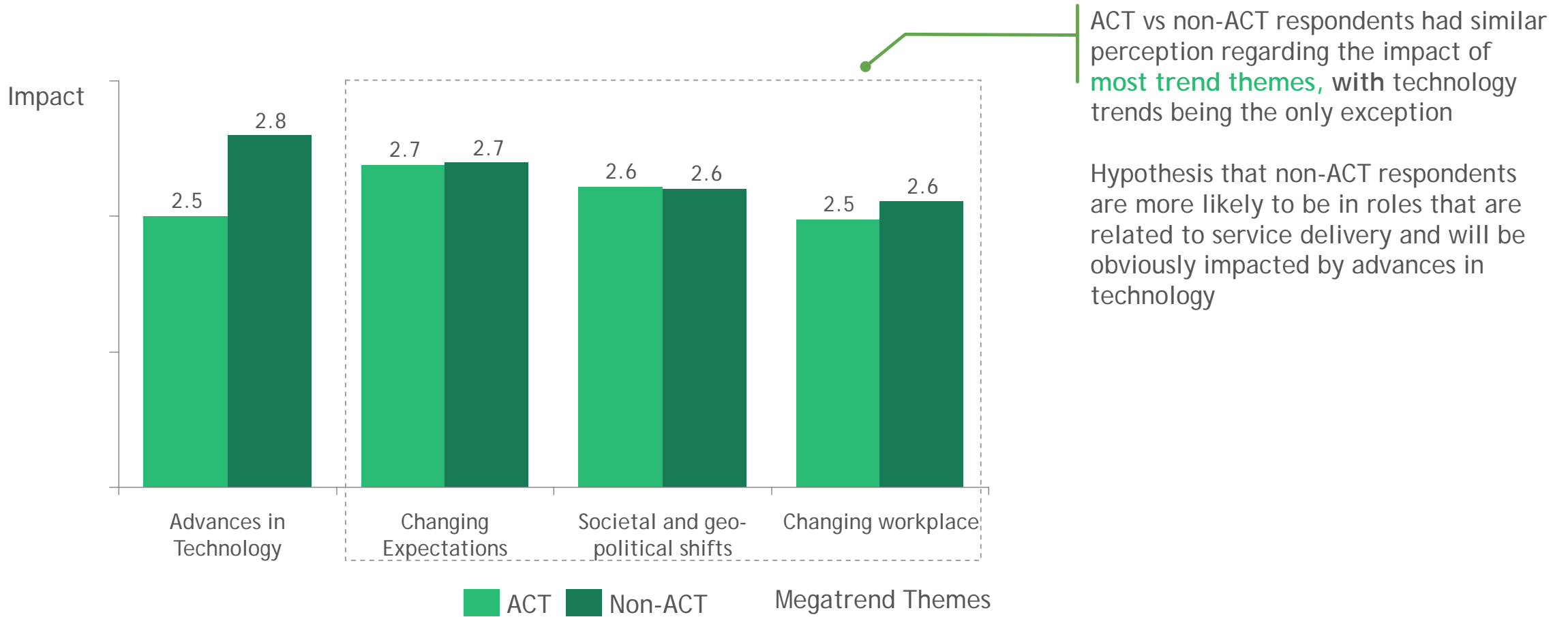


Compared to non-ACT based respondents, those based in the ACT ranked...



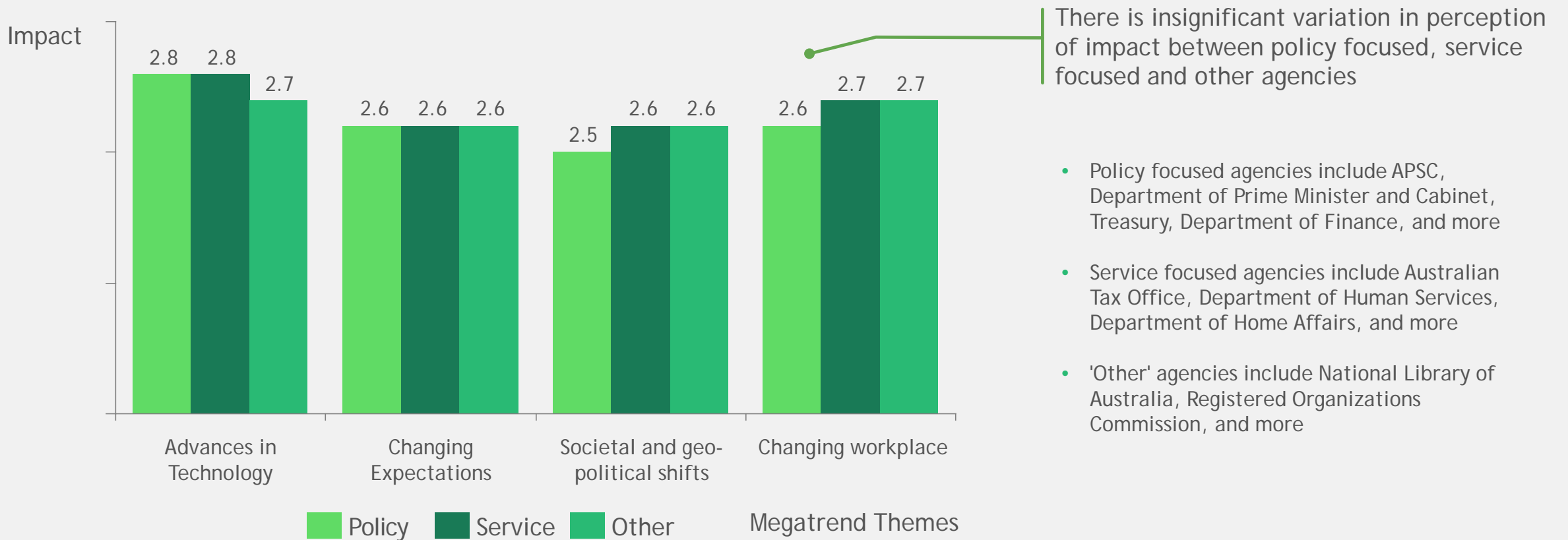
Note: Quantitative impact scores should be interpreted as: 1 - Limited impact; 2 - Noticeable impact; 3 - Substantial impact; 4 - Pervasive impact

No variation in ACT vs non-ACT impact scores for most trend themes



Note: Quantitative impact scores should be interpreted as: 1 - Limited impact; 2 - Noticeable impact; 3 - Substantial impact; 4 - Pervasive impact

No variation in perception of impact scores between policy focused and service focused agencies

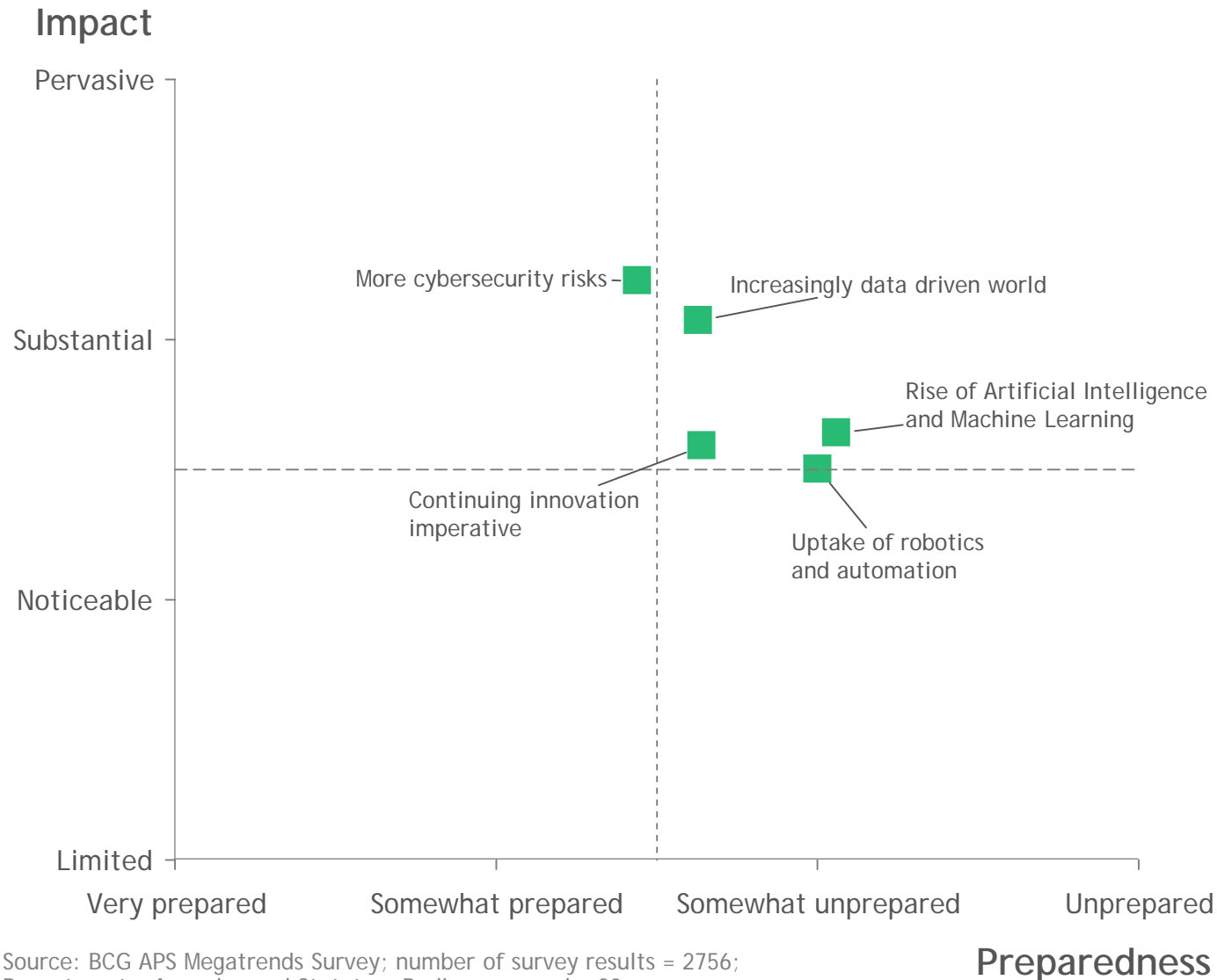


- Policy focused agencies include APSC, Department of Prime Minister and Cabinet, Treasury, Department of Finance, and more
- Service focused agencies include Australian Tax Office, Department of Human Services, Department of Home Affairs, and more
- 'Other' agencies include National Library of Australia, Registered Organizations Commission, and more

Appendix

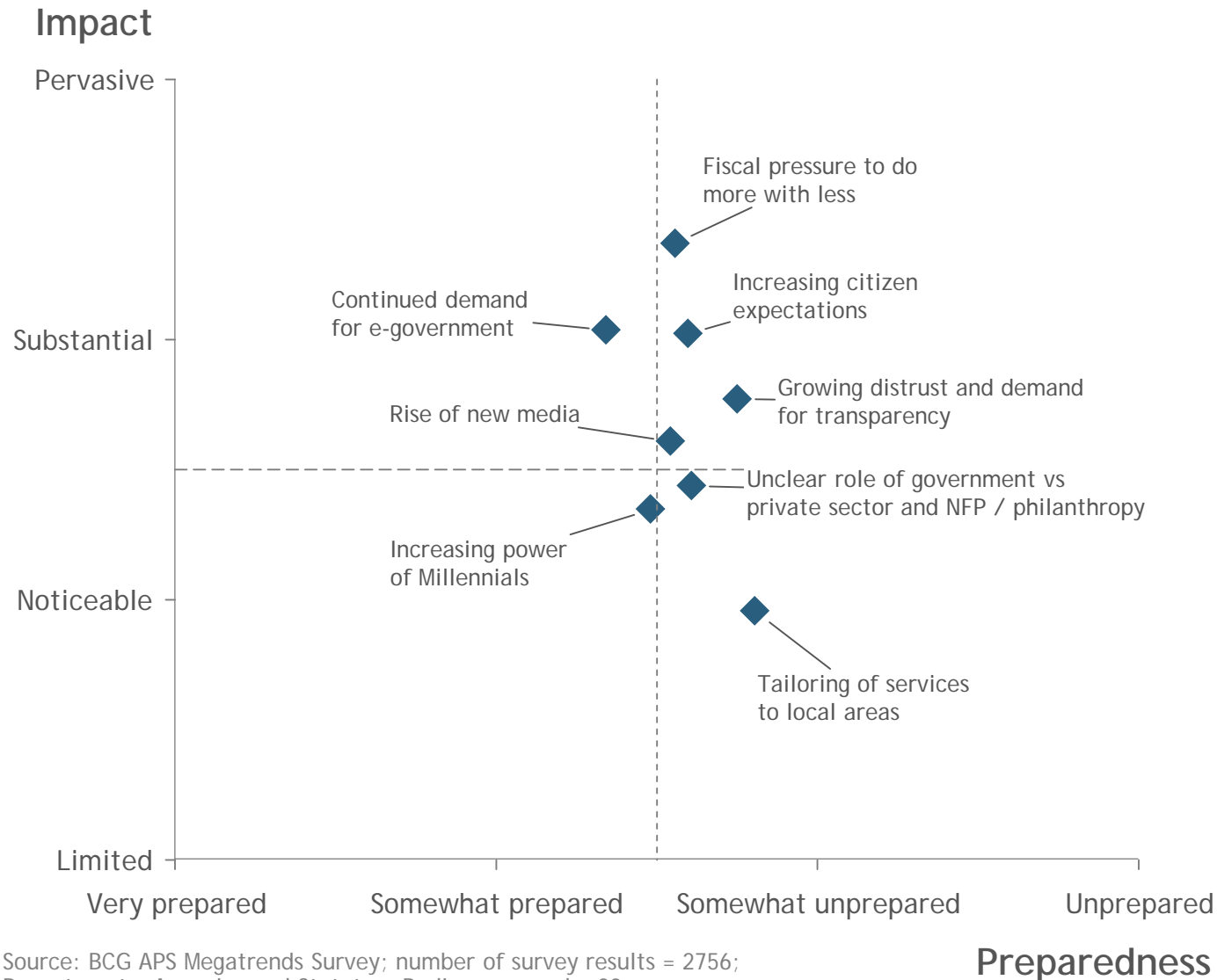
Analysis by theme

Survey results - Advances of technology



- Most of the advancement of **technology megatrends** were seen to have a great impact whilst being what the APS were least prepared for
- **Rise of AI and machine learning** and **uptake of robotics and automation** were identified as the requiring the most preparation out of all the trends
- **Cybersecurity** and **data** were identified as two of the three most impactful trends on the APS overall

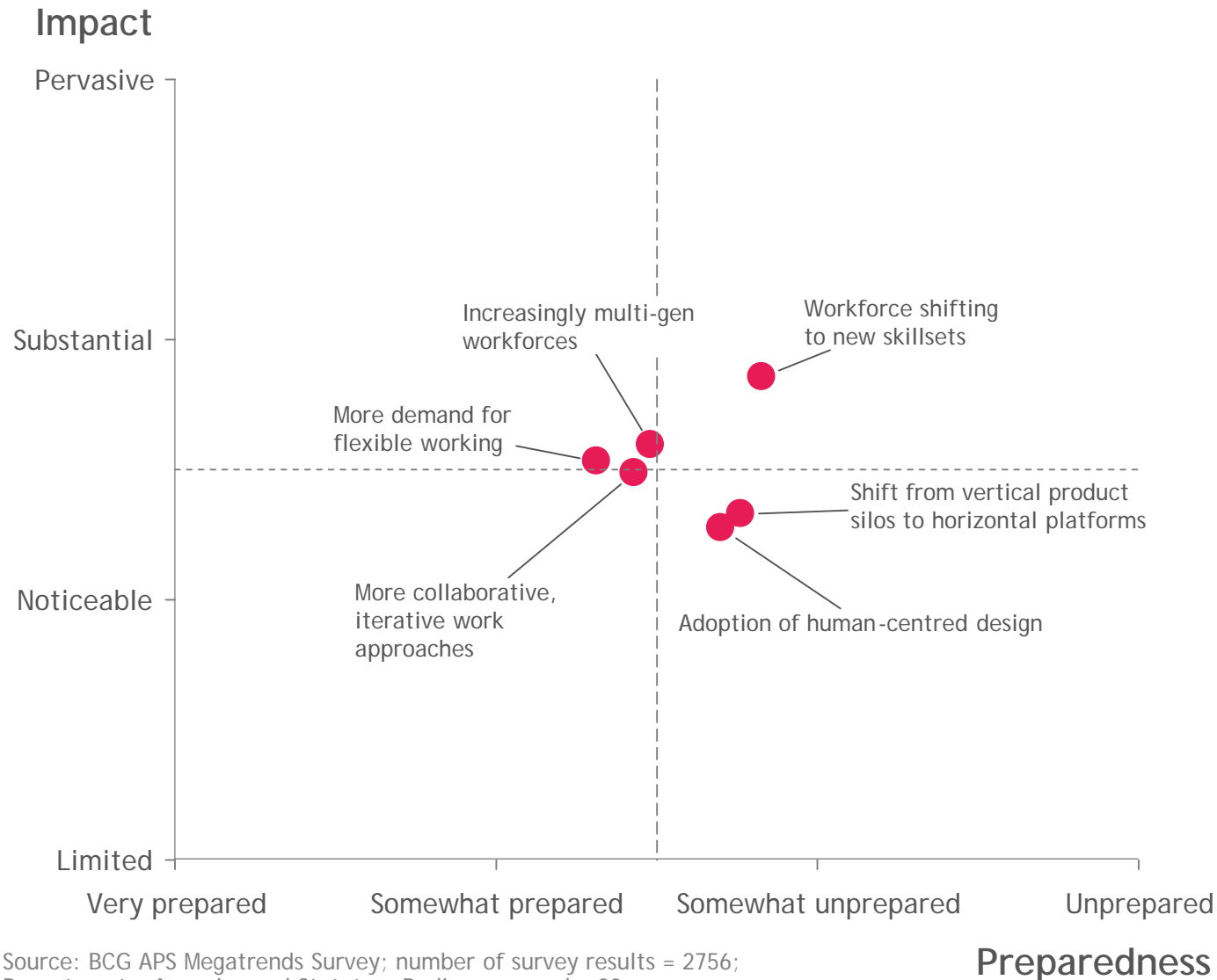
Survey results - Changing expectations



- **Fiscal pressures** was seen as the trend having the greatest impact on the APS of all trends surveyed
- **Increasing citizen expectations, demand for e-government and trust and transparency** were also highlighted as having a substantial impact on the APS
- All of the changing expectation trends were seen as being in the mid-range for preparedness

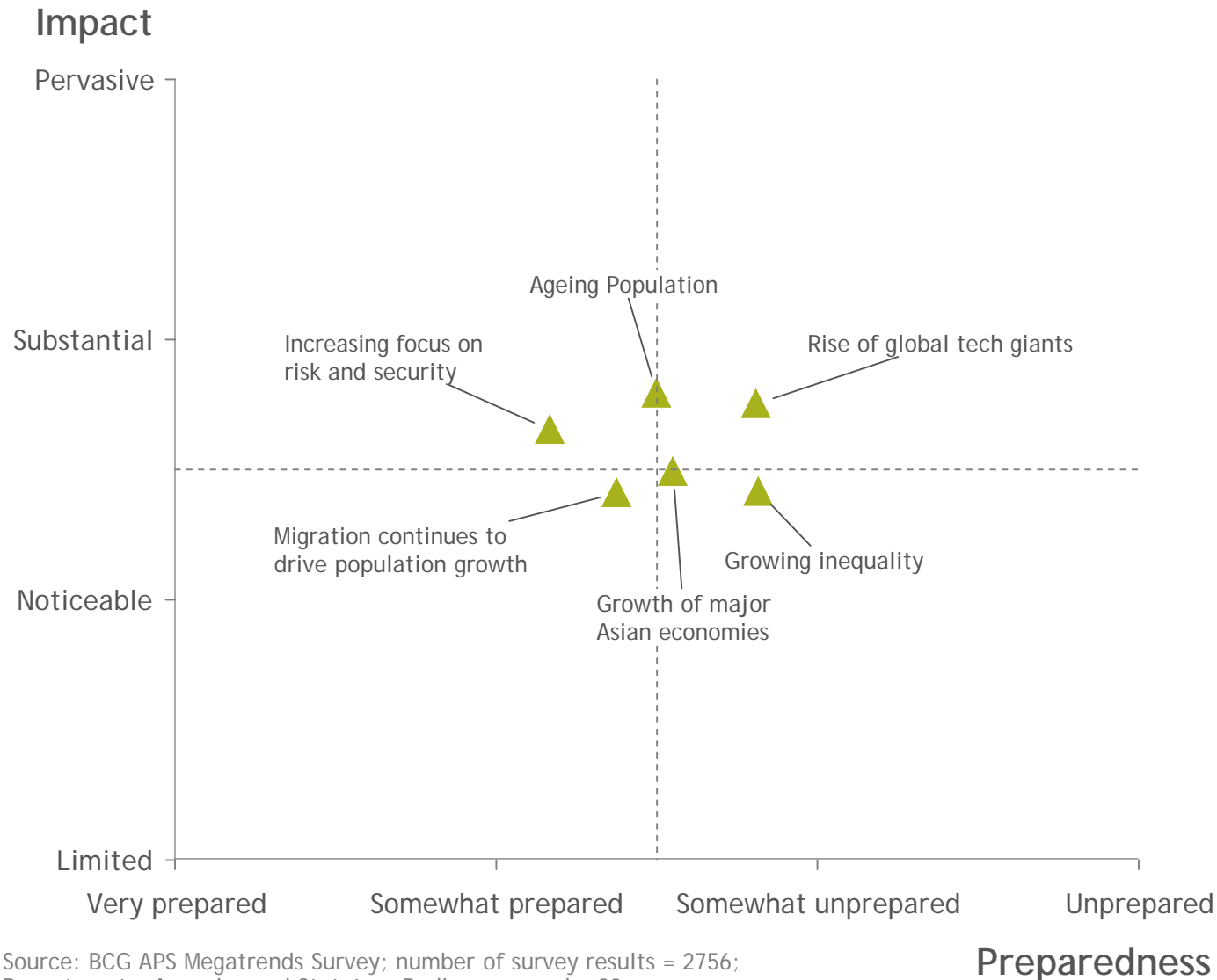
Source: BCG APS Megatrends Survey; number of survey results = 2756; Departments, Agencies and Statutory Bodies surveyed = 82

Survey results - Changing workplace



- Respondents believe the APS is not prepared to address **new skillsets**, though perceive it to have the highest impact
- **Vertical product silos to horizontal platforms** and adoption of **human centered design** were seen as requiring more preparation

Survey results - Societal and geo-political shifts



Source: BCG APS Megatrends Survey; number of survey results = 2756;
Departments, Agencies and Statutory Bodies surveyed = 82

- Respondents believe the APS is not prepared to address the rise of **global tech giants**, one of the top 5 overall megatrends; yet it is believed to have a substantial impact in the future
- All the Societal and geo-political shift' megatrends were generally in the mid-range for impact and preparedness

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A close-up photograph of a lit sparkler against a dark background. The sparkler is the central focus, with numerous bright, golden-yellow sparks radiating outwards in all directions. The sparks vary in length and intensity, creating a dynamic and celebratory atmosphere. The background is dark, which makes the bright sparks stand out prominently.

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