



World of the Future Hypotheses

digital**switzerland** 

MAKING SWITZERLAND
A LEADING DIGITAL
INNOVATION HUB

1

2020 is the year of digitalisation. 2021 is the year of transition to a new normality

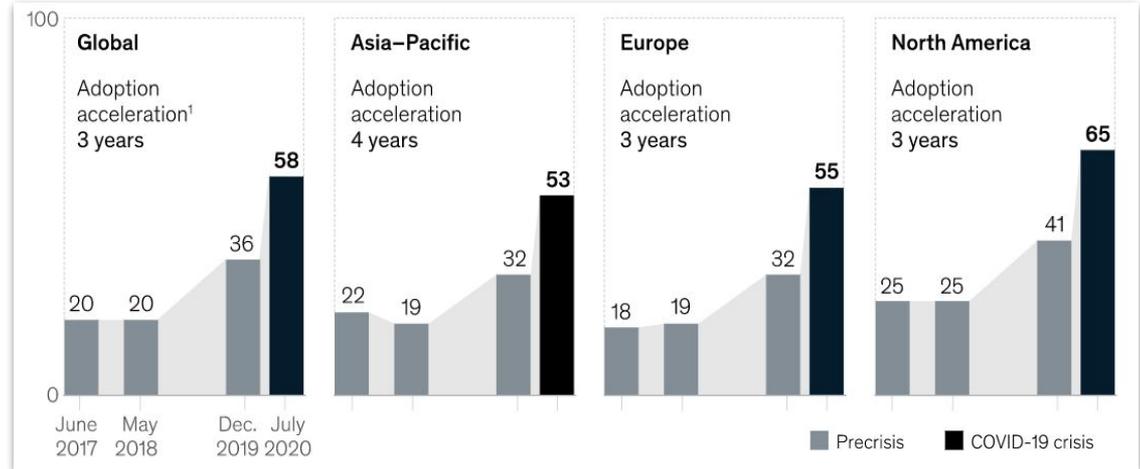


FACTS

In a matter of 1 - 2 years, we have vaulted 5 - 10 years forward in digital consumer and business adoption



Average share of customer interactions that are digital, in %



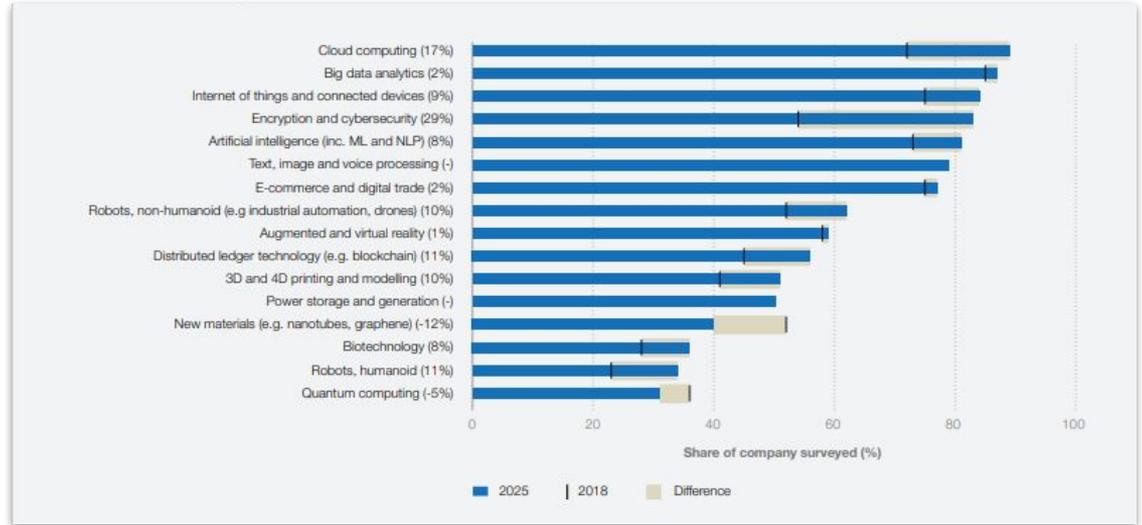
¹Years ahead of the average rate of adoption from 2017 to 2019

Source: McKinsey, "How Covid-19 has pushed companies over the technology tipping point" ([Link](#))

By 2025 we will see a rapid increase in technologies adapted and tasks performed by humans vs machines



Technologies likely to be adopted by 2025, by share of companies surveyed



Source: [WEF Future of Jobs](#)

2

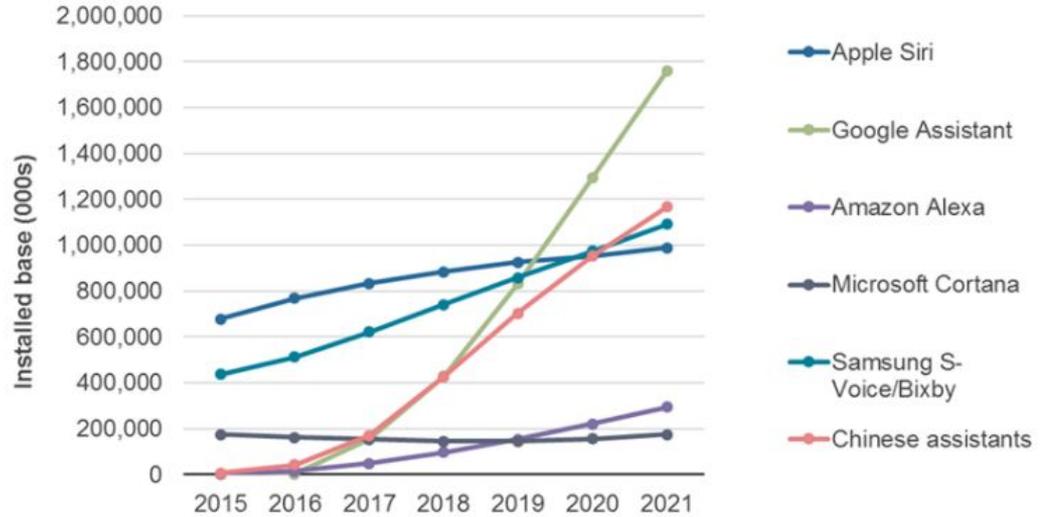
**New hybrid,
personalised and
automated inter-
faces based on
learnings from data**



Digital Voice Assistants - A Use Case

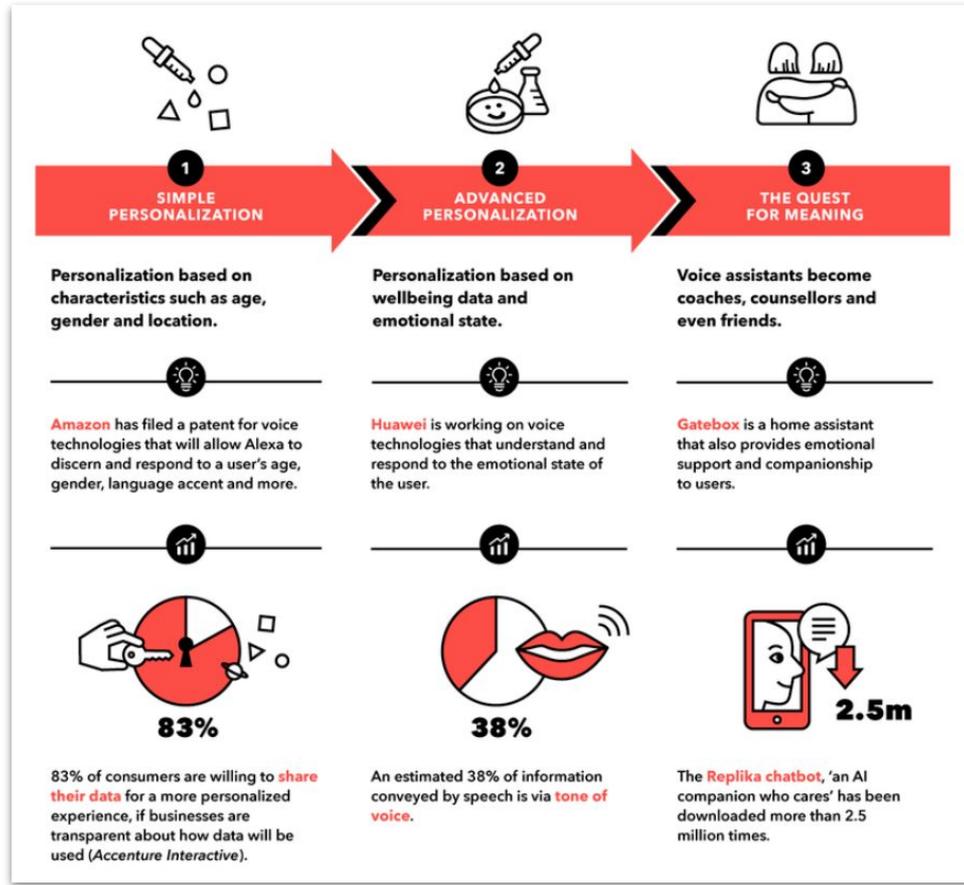


By 2021, it's estimated there will be more voice assistants on the planet than there are people



Source: [World Economic Forum](#), [Omdia](#)

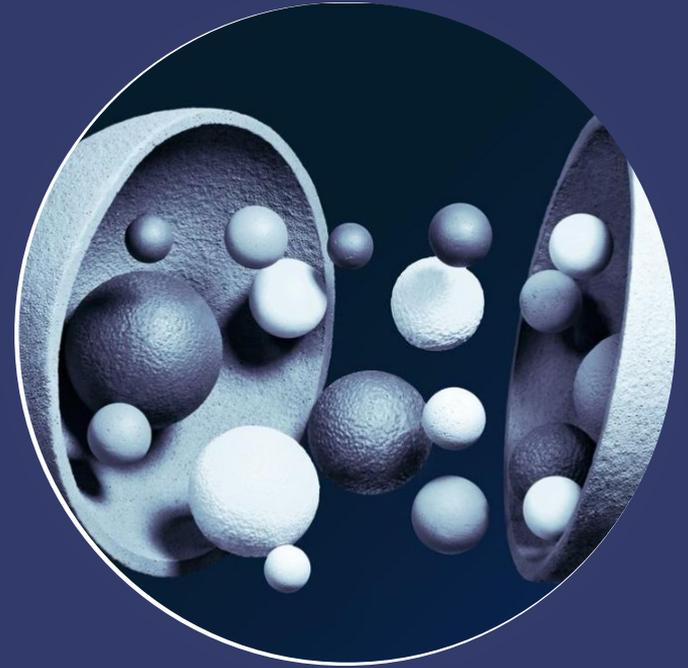
Personalisation will lead to a point where digital interfaces will become coaches, counsellors and even friends



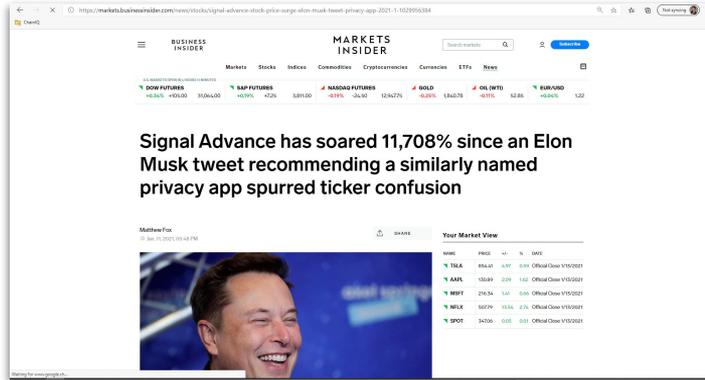
Source: [World Economic Forum](#), TrendWatching

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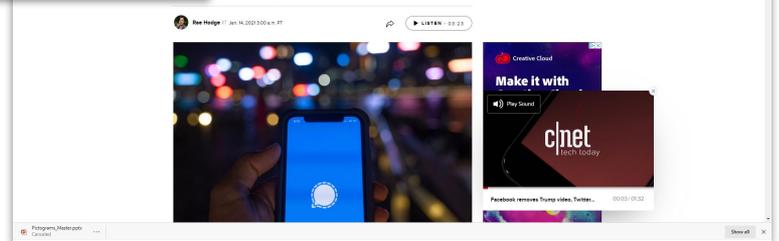
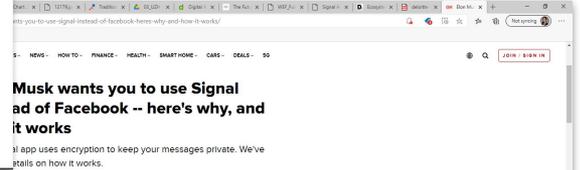
**New relationships
are there to come:
Much more based
on transparency
and trust**



Use Signal - A Use Case



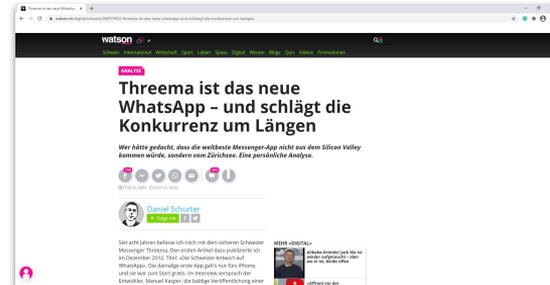
Source: [Markets Insider](#)



Source: [Cnet](#)

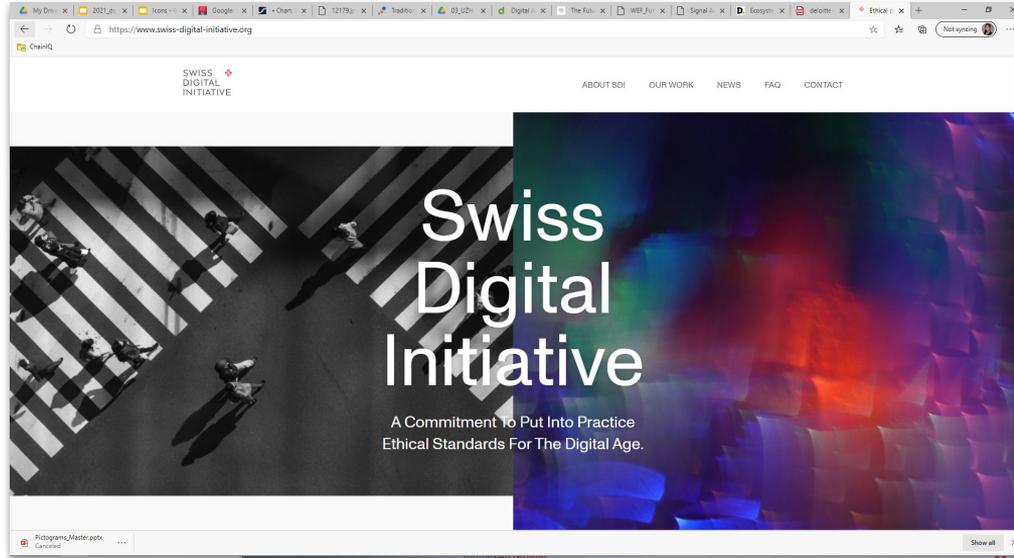


Source: [Forbes](#)



[Threema](#): Swiss-based, secure and private messenger

Swiss Digital Initiative: A commitment to put into practice ethical standards for the digital age



The starting point

Source: [Swiss Digital Initiative](https://www.swiss-digital-initiative.org)

4

**Digitalisation could
enable a more
sustainable society
and economy**



We have a long way to go...



92 bn tons

Of resources follow a linear economy path and are not recycled at the end of value chain each year

at **8.6%**

is the Circle Economy's global circularity estimated, which represents a decline from 9.1% in 2018

Source: [Lead the Circular Economy with CIRCelligence | BCG](#)

...the potential
is astonishing!



Potential annual value of regional circular economies by 2030, in USD million



Source: [Lead the Circular Economy with CIRCelligence](#) | BCG

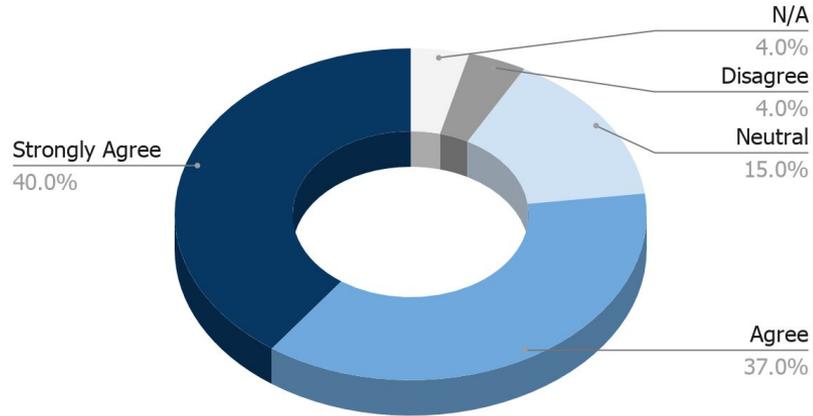
5 Transversal collaboration will be key for survival / differentiation



Companies' mindsets have shifted



“Ecosystems are very important for the implementation of my company’s growth strategies.”



Source: [Deloitte Ecosystems Survey 2021](#)

Three initiatives in Switzerland thriving by transversal collaboration



The **Swiss Datacenter Efficiency Association** fights against climate impact of datacenters by implementing a label to certify green datacenters



The **#SwissAutonomous-valley** is the leading space for accelerated autonomous business



swisscom



The **Humanitarian Tech Hub** engages for humanitarian action through implementation of science and technology development projects



Source: [SDEA](#), [Swiss Autonomous Valley](#), [Humanitarian Tech Hub](#)

6

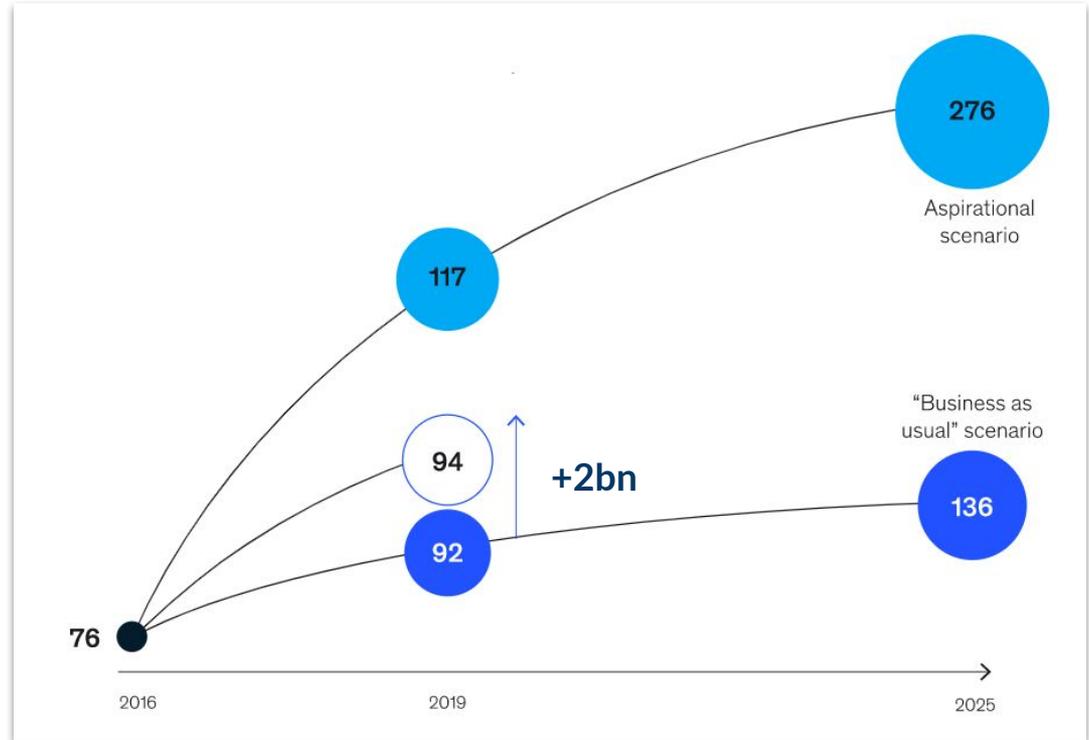
**A modern digital
infrastructure is a
game changer for a
country's prosperity**



Digitalisation resp. digital infrastructure is the lever for countries to stay on their growth trajectory - Use case CEE countries



2 scenarios: Size of digital economy of CEE countries (Digital Challengers) by 2025, in EUR bn

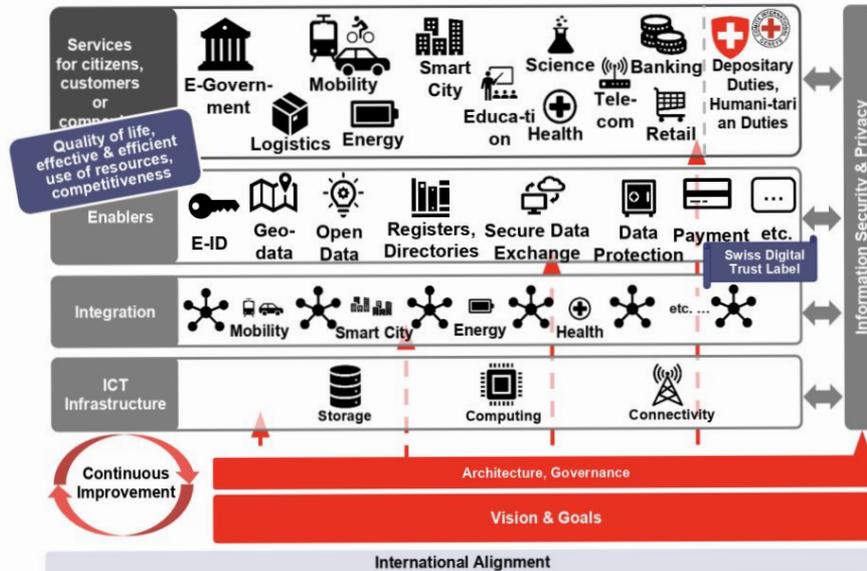


Source: [McKinsey](#)

The Swiss Digital Infrastructure Framework: How to catch up to best countries and develop a state-of-the-art infrastructure



Switzerland's optimal interconnected infrastructure, model



Source: Swiss Digital Infrastructure Framework

7

Markets tend to become more monopolistic, especially for internet, data and platform companies



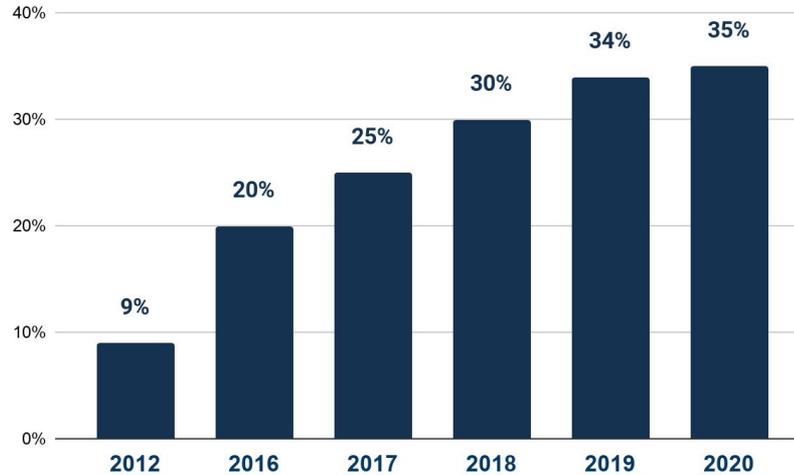
Facebook and Google have a monopoly like position in global media advertising revenues



Global advertising revenues of 2012 - 2020, %



&

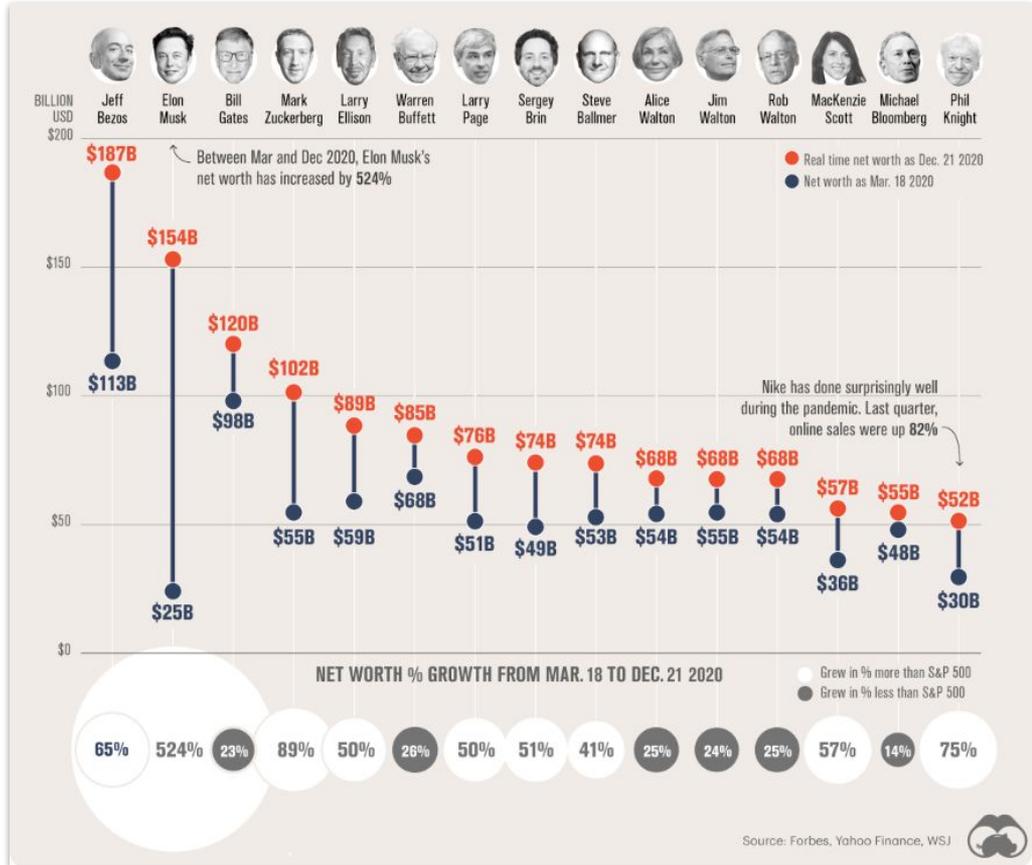


Source: [Statista Chart 2017](#), [Statista Global Advertising Revenue](#)

...and inequality rises



Most of American billionaires got richer during COVID-19



Source: Visualcapitalist

8

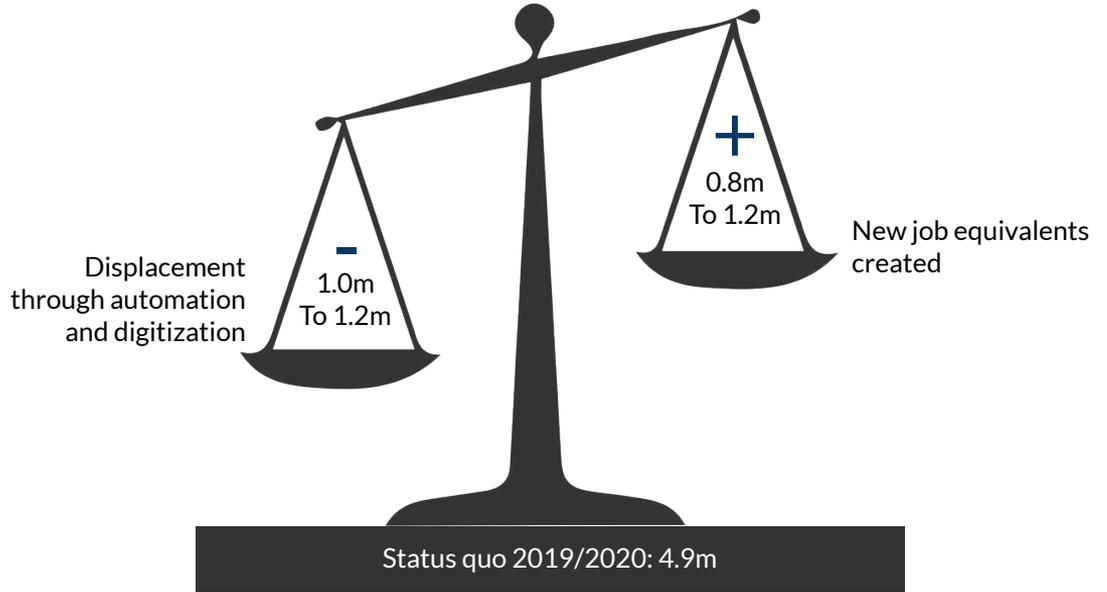
**Be ready to learn.
Every day!**



The shift on the job market will be very consequent, 20%!



Over the long term, the number of jobs gained through digitisation will be roughly equivalent to those displaced



Source: Bundesamt für Statistik (Swiss Federal Statistics Office); McKinsey Global Institute analysis

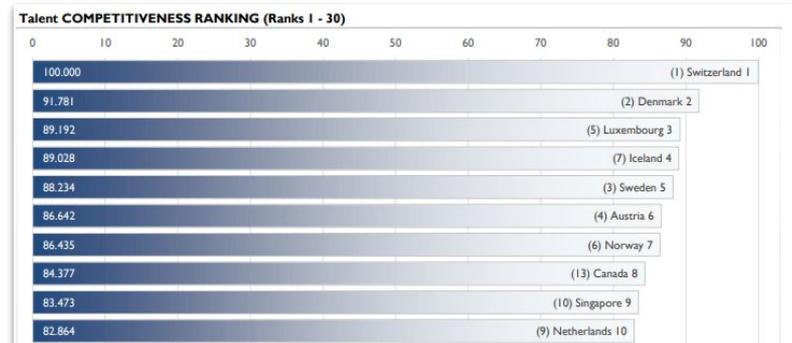
Switzerland is a key hub for talent. We only have three elements: Mountains, Infrastructure and Human Brains

Insead, Adecco and Google Global Talent Competitiveness Index 2020

COUNTRY	SCORE	OVERALL RANK	INCOME GROUP
Switzerland	81.26	1	High income
United States of America	79.09	2	High income
Singapore	78.48	3	High income
Sweden	75.82	4	High income
Denmark	75.18	5	High income
Netherlands	74.99	6	High income
Finland	74.47	7	High income
Luxembourg	73.94	8	High income
Norway	72.91	9	High income

Source: [Global Talent Competitiveness Index](#)

IMD World Talent Ranking 2020



Source: [IMD World Talent Ranking](#)

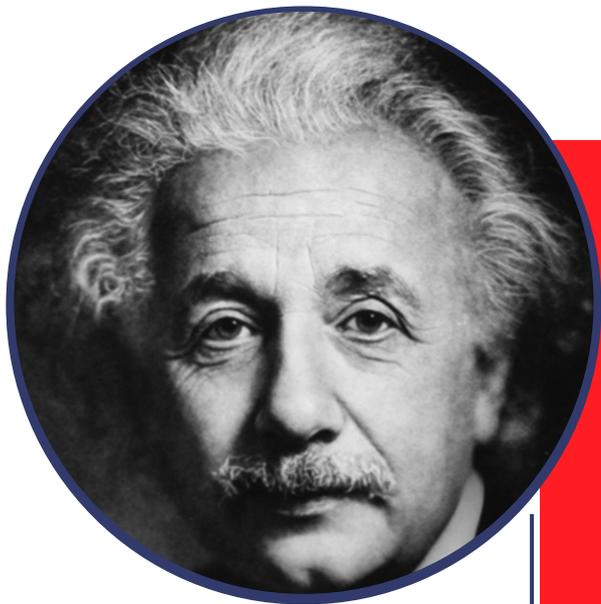
The job shift is inevitable



50% of revenues will be at risk due to shifting consumers' spending after 2021/2022

65% of kids today will do jobs that haven't been invented yet

Source: Gartner Trends 2017, [OECD/WEF](#)



**Once you stop learning,
You start dying.**

Thank you

