



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

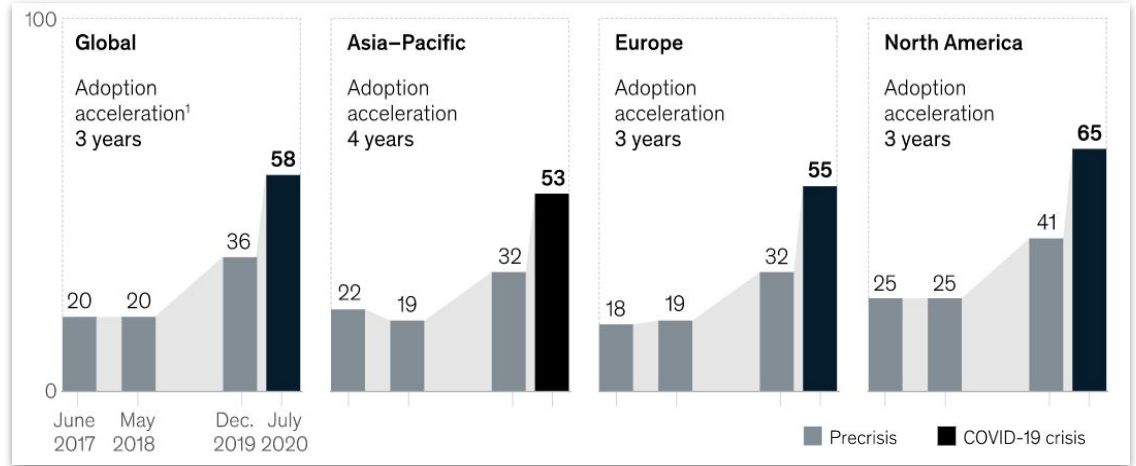


FACTS

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 %



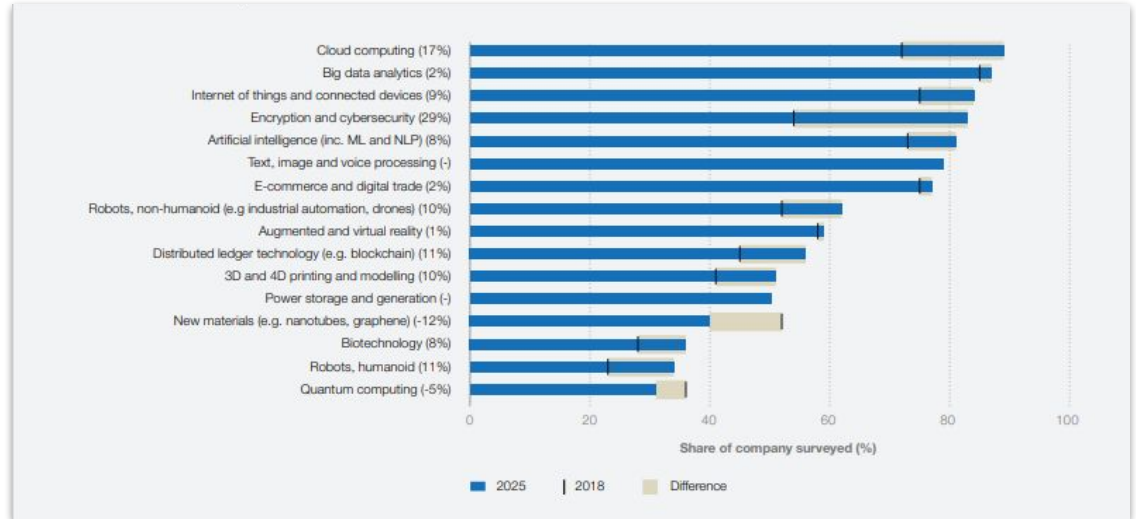
¹Years ahead of the average rate of adoption from 2017 to 2019

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

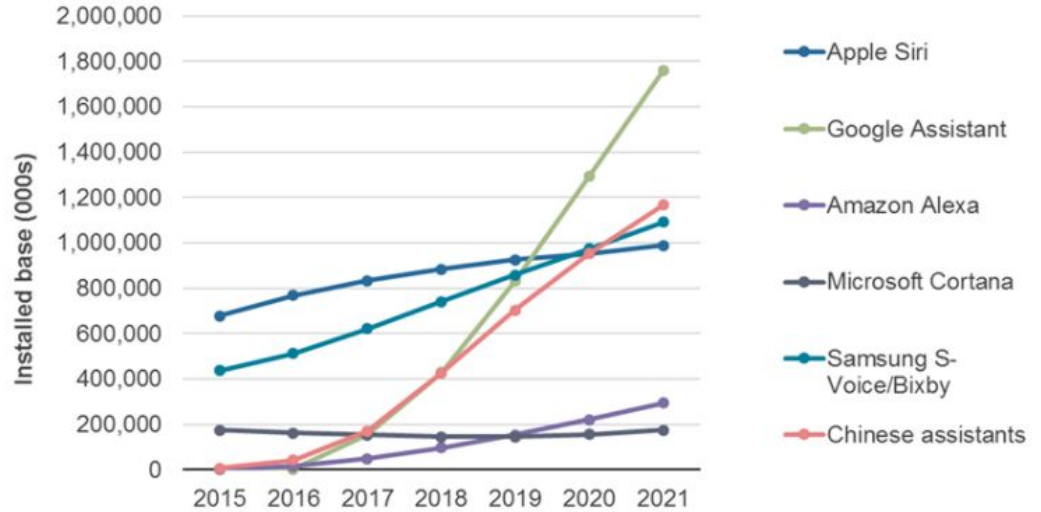
**New hybrid,
personalised and
automated inter-
faces based on
learnings from data**



Digital Voice Assistants - A Use Case

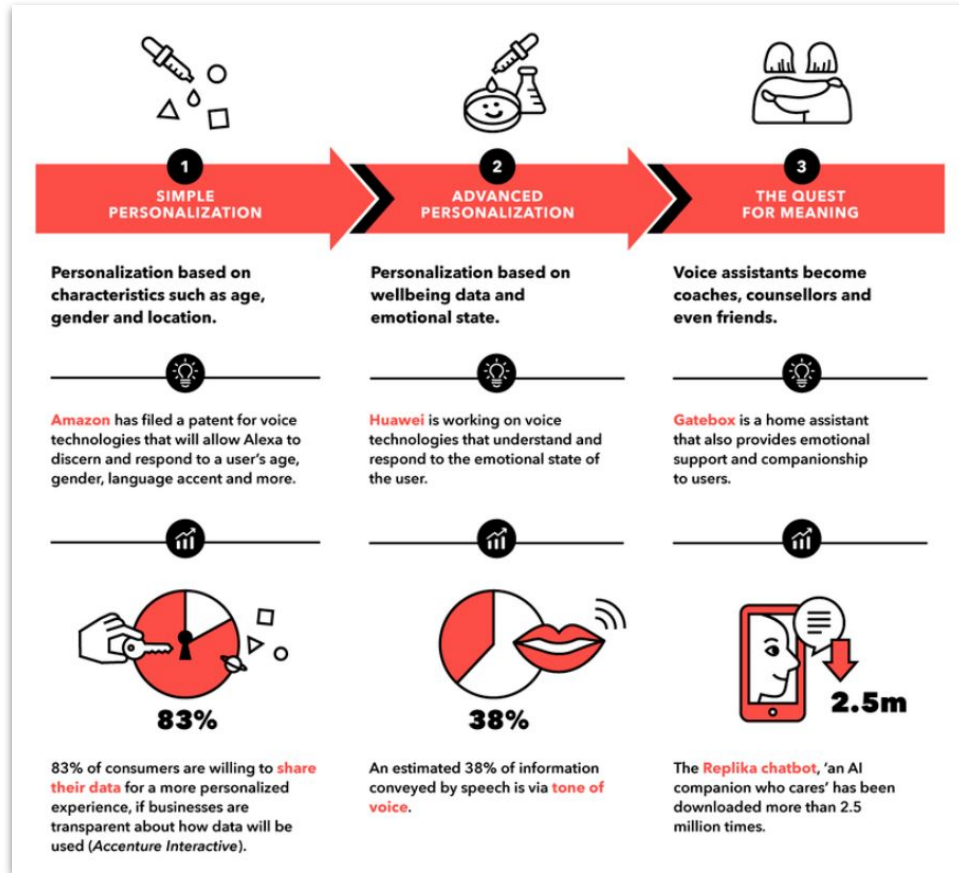


By 2021, it's estimated there will be more voice assistants on the planet than there are people



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

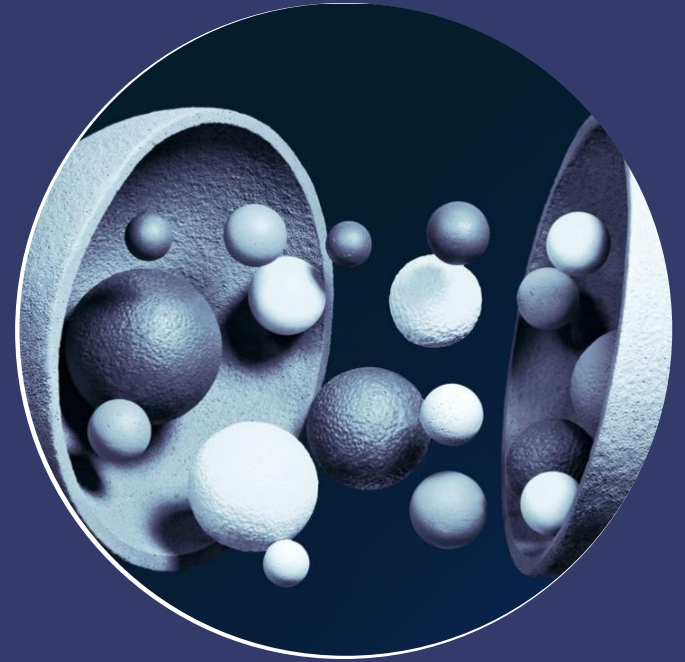
Personalisation will lead to a point where digital interfaces will become coaches, counsellors and even friends



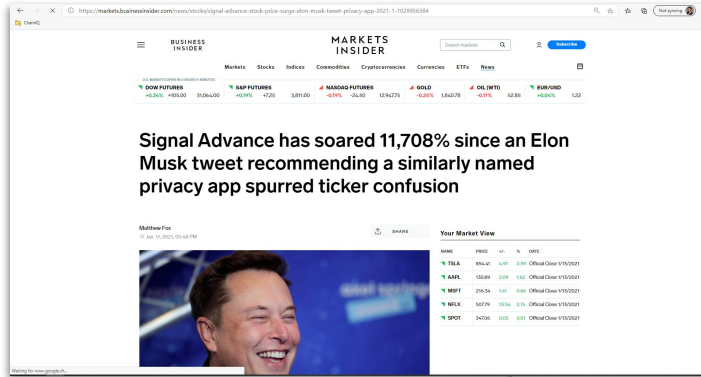
Source: [World Economic Forum](#), TrendWatching

3

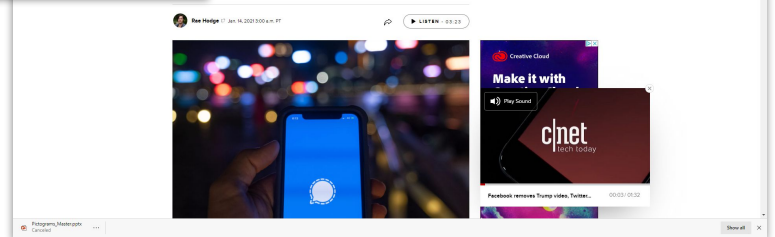
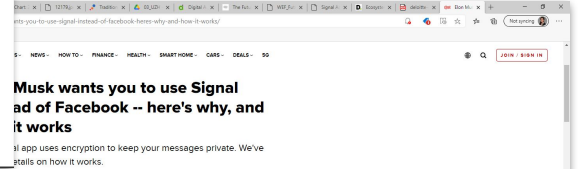
**New relationships
are there to come:
Much more based
on transparency
and trust**



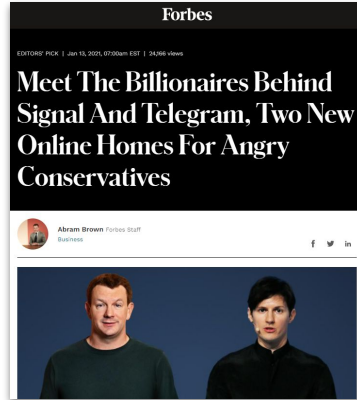
Use Signal - A Use Case



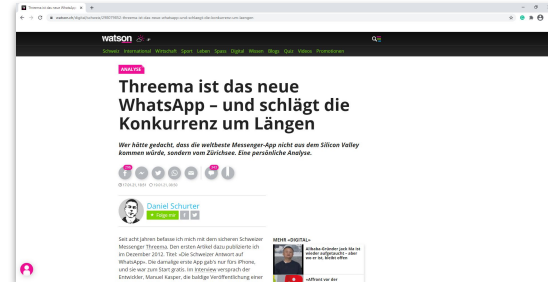
Source: [Markets Insider](#)



Source: [Cnet](#)

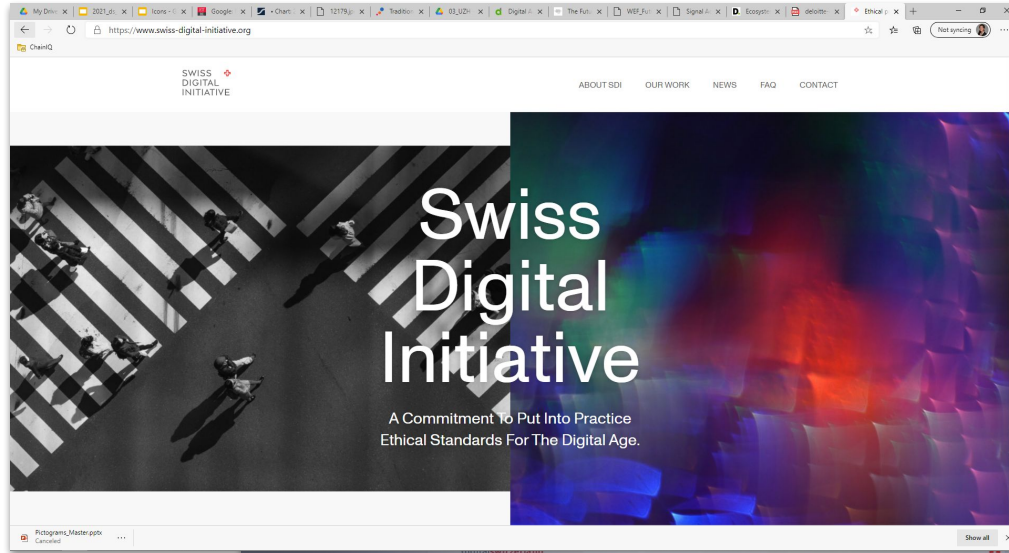


Source: [Forbes](#)



[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%**

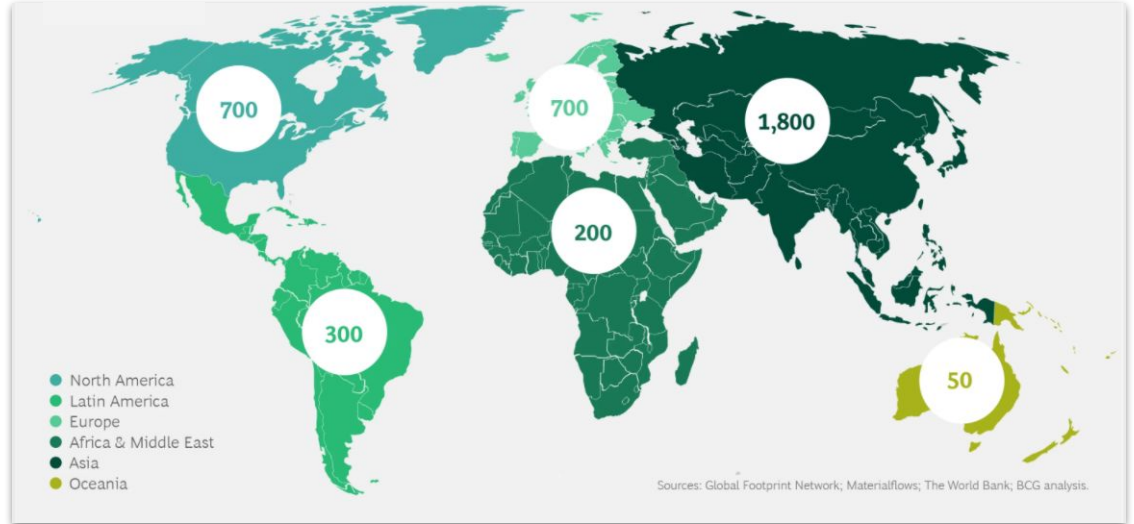
is the Circle Economy's global circularity estimated, which represents a decline from 9.1% in 2018

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

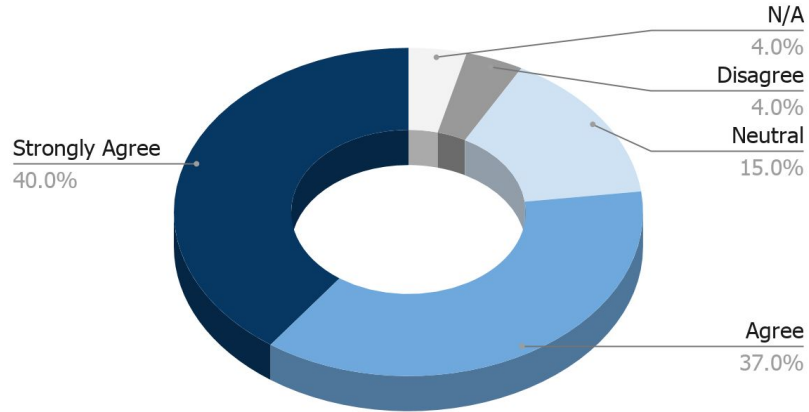
5 Transversal collaboration will be key for survival / differentiation



Companies' mindsets have shifted



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



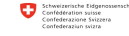
Source: [Deloitte Ecosystems Survey 2021](#)

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

asut



Lucerne University of Applied Sciences and Arts
HOCHSCHULE LUZERN

EPFL



digitalswitzerland

Hewlett Packard Enterprise

ecocloud
with EPFL, FORUMSUD, COMSUD



energieschweiz
Lower Engagement, Lower Carbon



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

wenger & vieli
Attorneys at law



swisscom



digitalswitzerland

Lucerne University of Applied Sciences and Arts
HOCHSCHULE LUZERN



ETH zürich



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

EPFL

ETH zürich



ICRC

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

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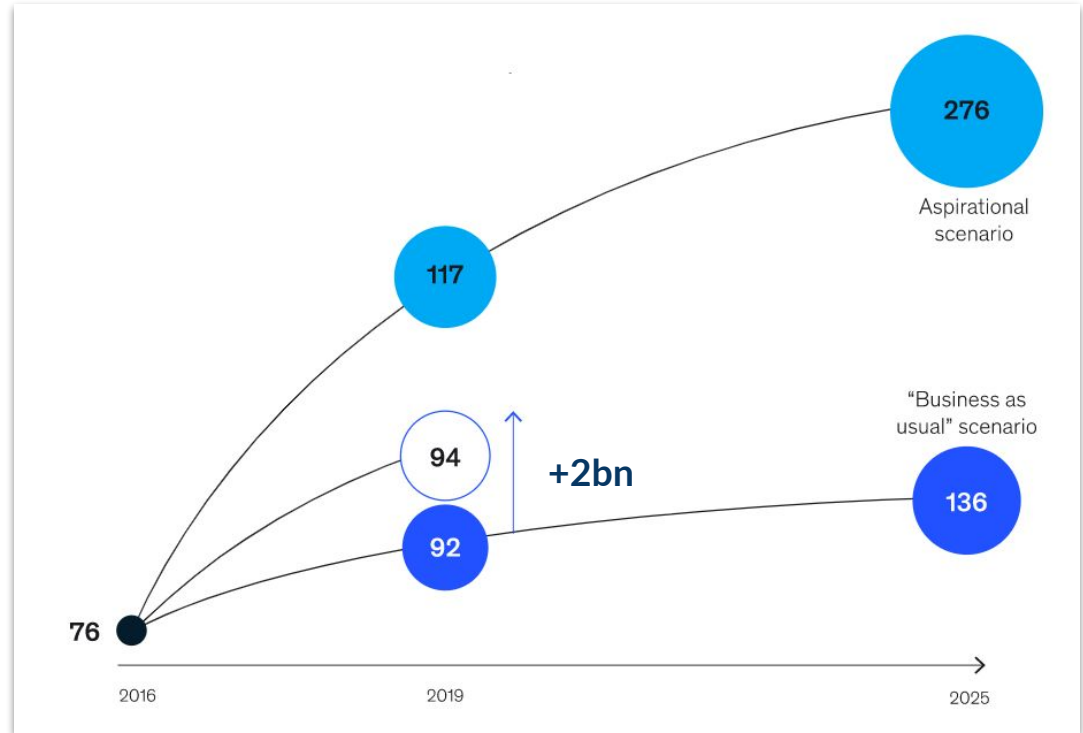
A modern digital infrastructure is a game changer for a country's prosperity



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

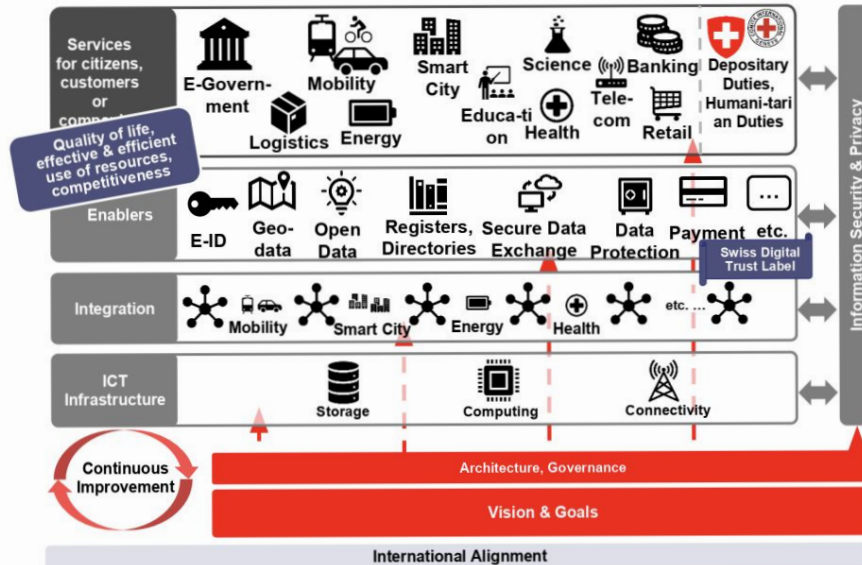


Source: [McKinsey](#)

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



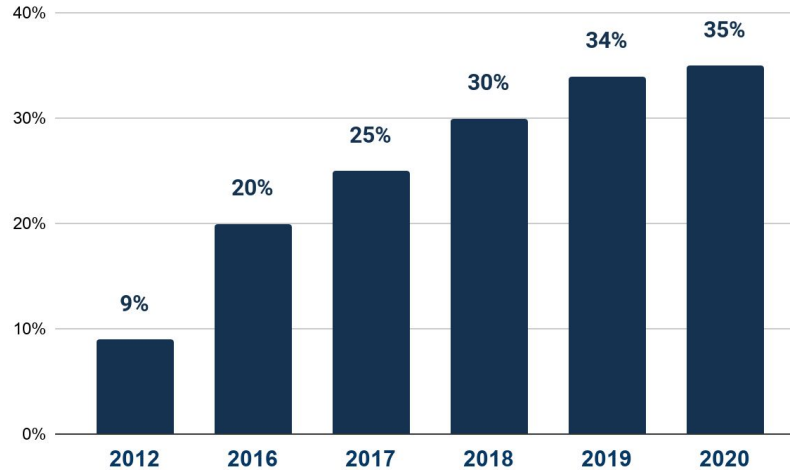
Facebook and Google have a monopoly like position in global media advertising revenues



Global advertising revenues of 2012 - 2020, %



&

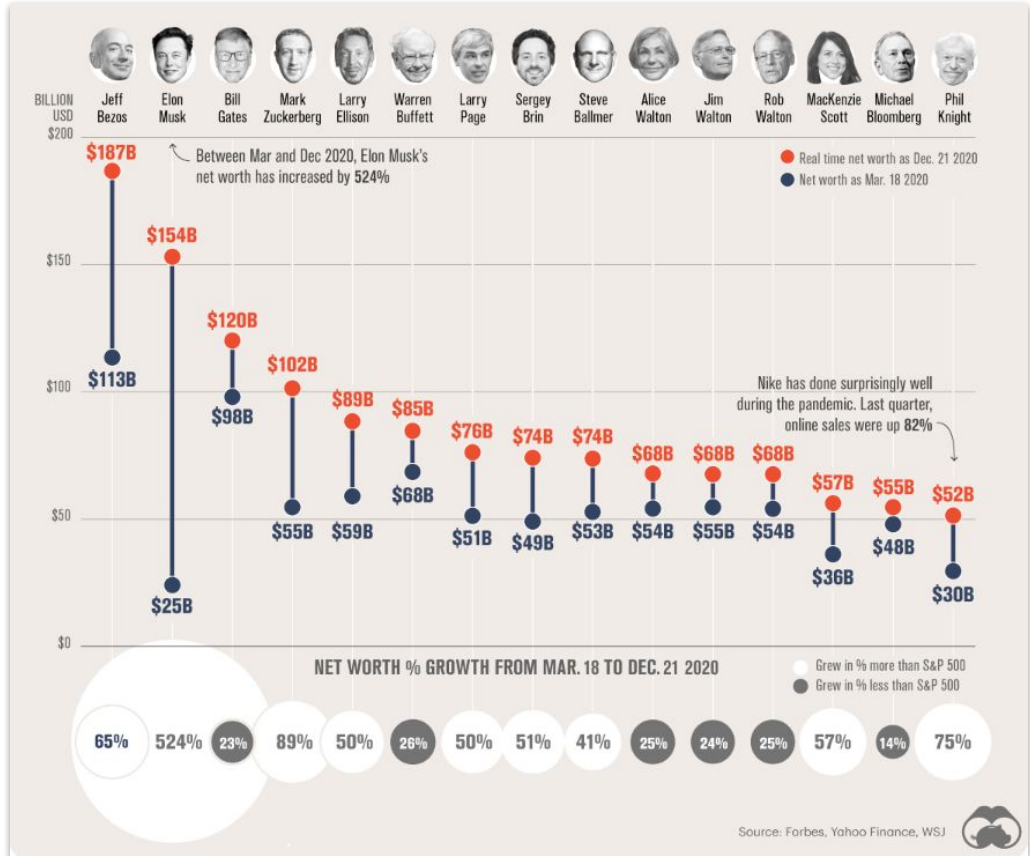


Source: [Statista Chart 2017](#), [Statista Global Advertising Revenue](#)

...and inequality rises



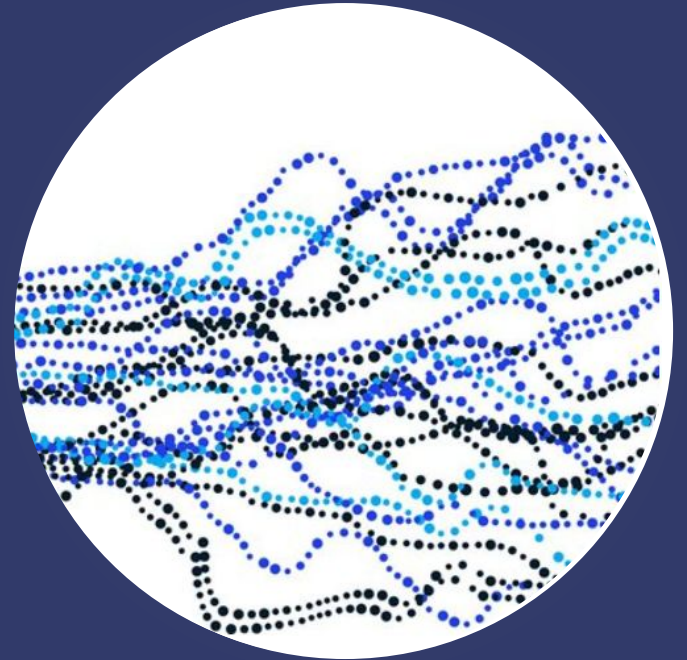
Most of American billionaires got richer during COVID-19



Source: Visualcapitalist

8

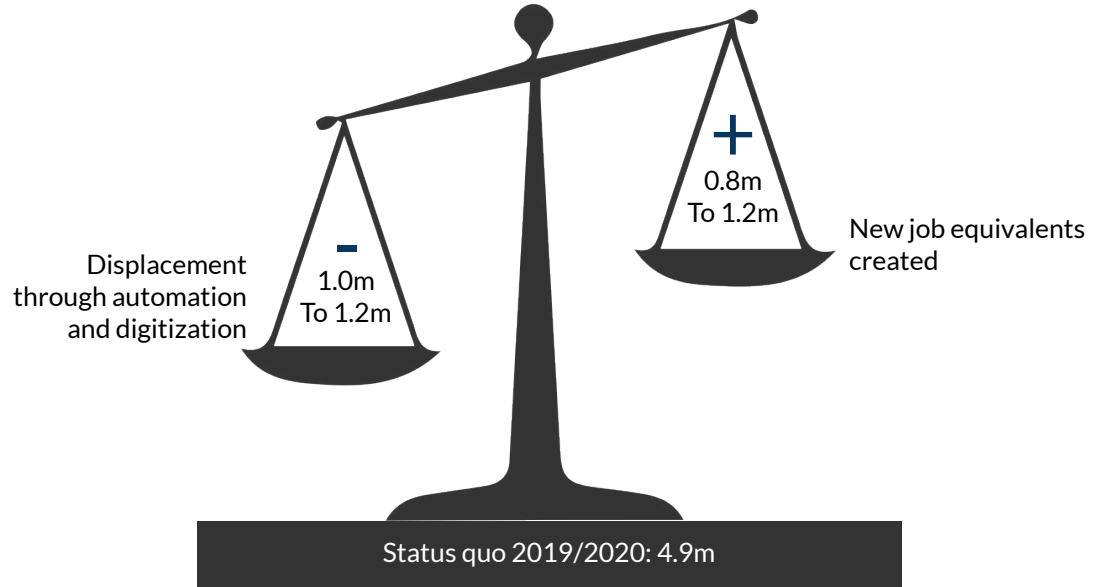
**Be ready to learn.
Every day!**



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

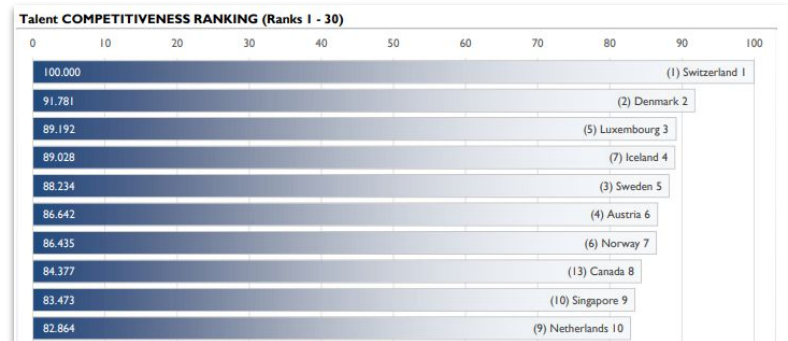
Switzerland is a key hub for talent. We only have three elements: Mountains, Infrastructure and Human Brains

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](#)

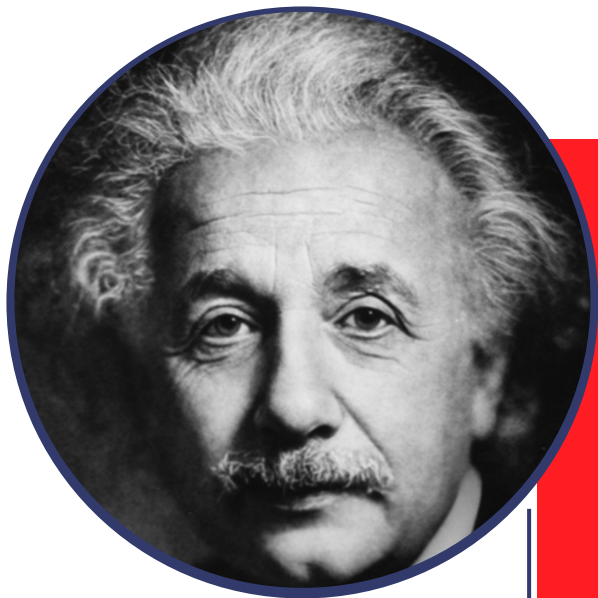
The job shift is inevitable



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**

