



AMP LIFY YOU

TECHNOLOGY FOR PEOPLE

How Swiss companies can become intelligent enterprises by combining People and Technology.

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INTRODUCTION

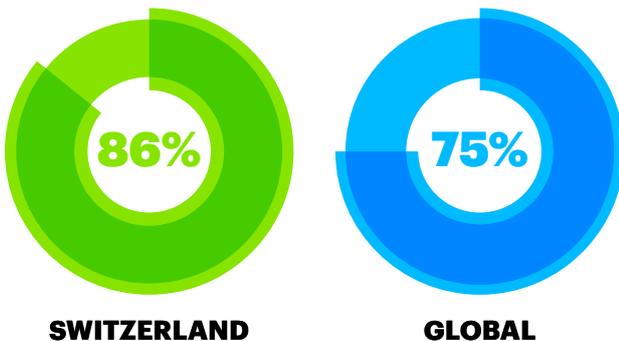
The digital revolution is generating changes that everyone can see. We've entered an era of unprecedented disruption. Technologies are evolving at an accelerating pace and this has impacts for all industries as well as radically reshaping customer expectations. In response, as Accenture's Swiss Digital Index highlights, Swiss companies are progressing towards ever higher levels of digitalization.¹

Such rapid and profound change raises major questions and creates both opportunities and challenges. However, Accenture believes that these technology-driven developments are a positive force. Why? Because the digital revolution is all about human empowerment. Of course, there are risks, as there are with any technology. But now, as never before, people are in control. People no longer have to adapt to technology. Instead, technology is adapting to us.

The Accenture Technology Vision 2017 "Technology for People: The Era of the Intelligent Enterprise"² highlights the business potential that companies can realize by using technologies with a "People First" approach. In this report, we'll examine the impacts and implications for Swiss companies.

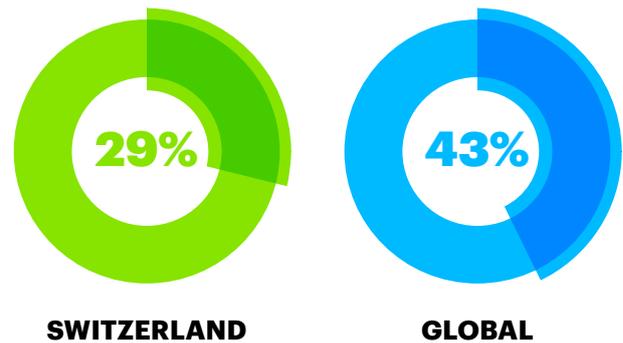
Accenture Technology Vision 2017 shows that Swiss executives are well aware of the changes digital brings. Indeed, 86 percent perceive a moderate or complete disruption in their industry (Figure 1). That's higher than the global proportion (75 percent).

Figure 1: My industry is currently facing a moderate or complete degree of disruption



On the other hand, the awareness of digital's impact contrasts with Swiss executives' perceptions and thoughts about their own organizations. Only 29 percent of them say that embedding digital is part of their business strategy (Figure 2). This is significantly below the global proportion (43 percent). Most Swiss executives say their company invests in digital only in selected areas or business units. This highlights the gap between the keen perception of disruption and the comprehensiveness of strategies with which Swiss companies are responding.

Figure 2: We are comprehensively investing in digital technologies as part of our overall business strategy



This report introduces five tech trends identified in the Accenture Technology Vision 2017. These underscore the importance of focusing on "Technology for People" to achieve business success. Our analysis focuses on how Swiss companies are responding.

TREND 1

AI IS THE NEW UI

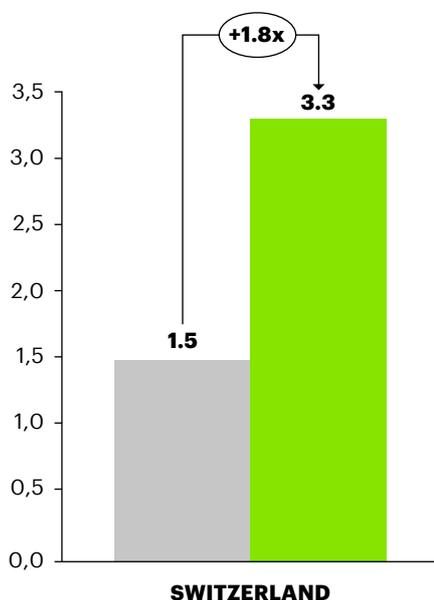
Artificial intelligence (AI) isn't simply a buzzword. It's real and it's set to have a tremendous impact on our lives. AI is a topic that keeps Swiss executives awake at night: 41 percent of them believe that AI will radically transform their organization over the next three years.

AI creates huge opportunities for the Swiss economy. An Accenture Research study reveals AI could double Swiss economic growth by 2035: from 1.5 percent to 3.3 percent per year³. According to the analysis, the impact of AI on the Swiss economy by 2035 could be worth US\$242 billion, roughly the size of Finland's GDP today (Figure 3).

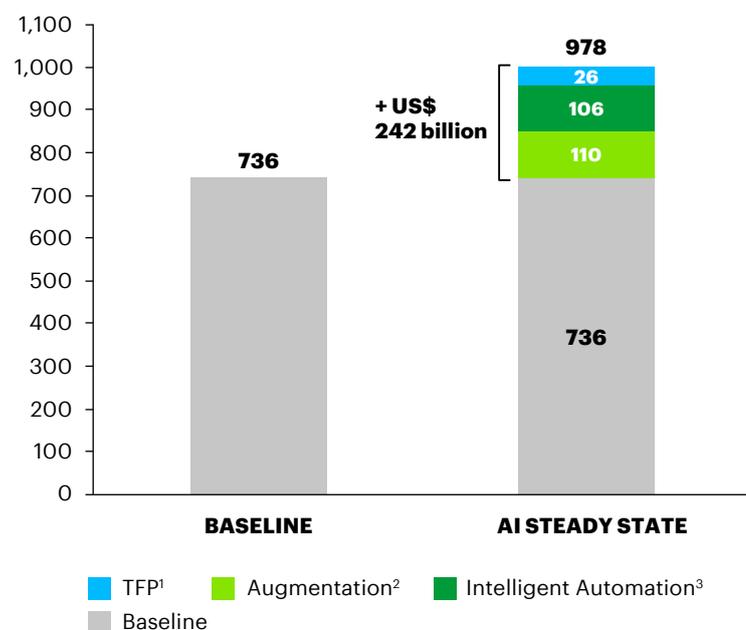
The future of AI will not only be about automating complex and repetitive tasks. Moving beyond a back-end tool for intelligent automation, AI is taking on more sophisticated roles within technology interfaces. AI will play a key role in forging a new relationship between people and machines, creating new value by complementing and enhancing human capabilities.

Figure 3: AI impact on Swiss Gross Value Added (GVA) by 2035

Real GVA by 2035 (% annual growth to 2035)



Switzerland's GVA in 2035 (US\$ billion)



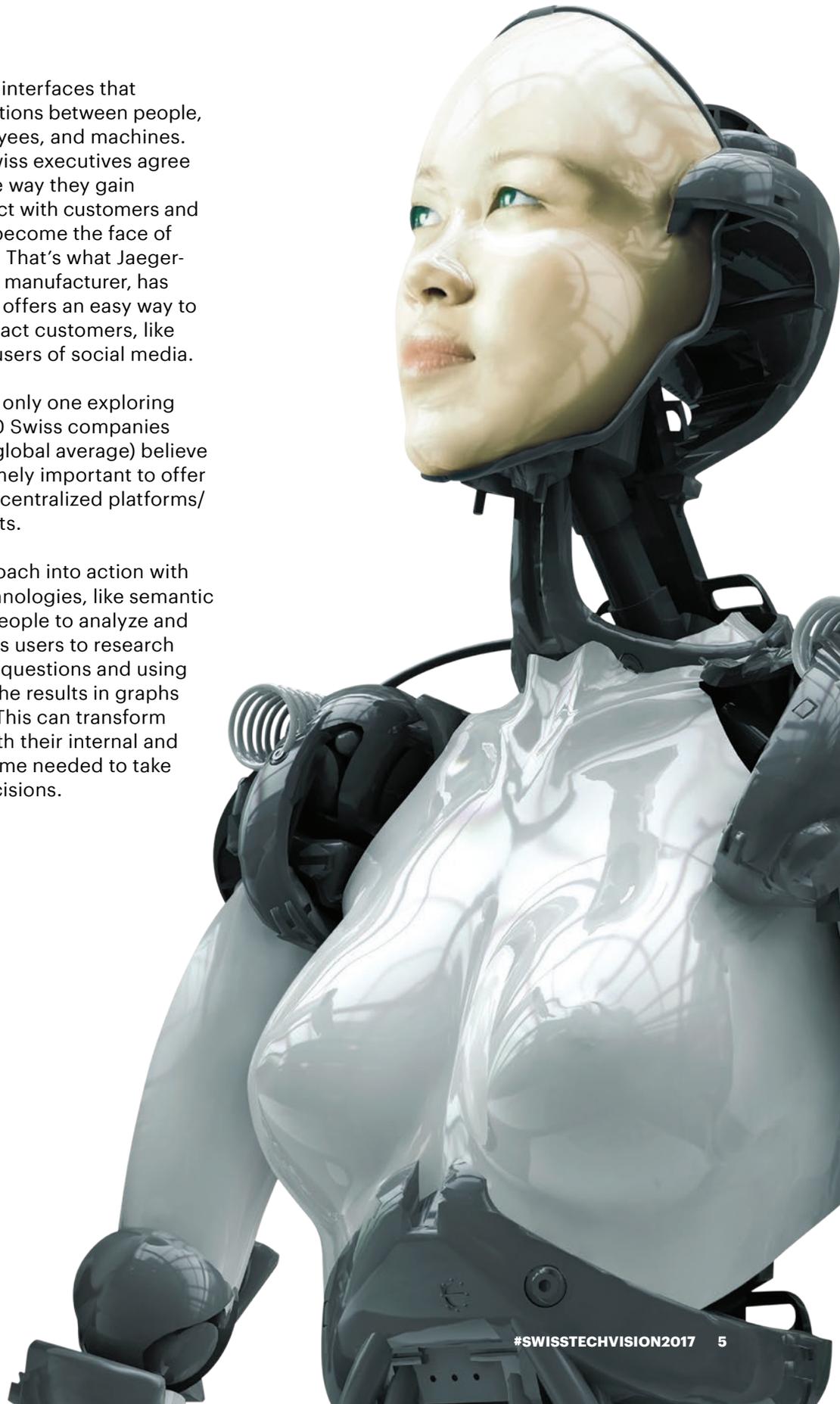
1. Total Factor Productivity measures the economy growth from innovations and technological change.
2. Augmentation refers to the growth given by the ability to use capital and labor more effectively thanks to AI.
3. Intelligent automation refers to the growth created by automating through AI complex physical world tasks that require adaptability and agility.

Source: Accenture and Frontier Economics

AI will achieve this through interfaces that amplify and simplify interactions between people, both customers and employees, and machines. Seventy-nine percent of Swiss executives agree that AI will revolutionize the way they gain information from and interact with customers and 77 percent say that AI can become the face of their organization or brand. That's what Jaeger-LeCoultre, the luxury watch manufacturer, has done. Its Facebook chatbot offers an easy way to approach its brand and attract customers, like Millennials, that are heavy users of social media.

Jaeger-LeCoultre is not the only one exploring AI's potential: nine out of 10 Swiss companies (10 percent more than the global average) believe that it's important or extremely important to offer products/services through centralized platforms/assistants or messaging bots.

Veezoo is putting this approach into action with a platform that uses AI technologies, like semantic web, to make it easier for people to analyze and understand data⁵. It enables users to research and explore data by asking questions and using data visualization to show the results in graphs built by an intelligent tool. This can transform how companies interact with their internal and external data, cutting the time needed to take well-informed strategic decisions.



Another company, Swisscom, is using AI to better serve its customers by empowering its call center agents with a service called “Best Solution”. This is an AI-powered solution that enables agents to quickly and effectively find the best solution for every customer. In doing so it improves their ability to interact with customers and provide a better experience⁶.

Others are using AI to create new customer interfaces. One start-up, Spitch, has leveraged AI to develop speech recognition software that understands Swiss German⁷. SBB has already implemented the solution into its mobile app⁸, and more broadly the technology could have huge implications for a vast range of sectors, taking Swiss customers’ experience to the next level.

These are just the start. In the near future, Swiss companies say they’ll be investing in AI for both front- and back-end applications, with a focus on deep learning, machine learning and video analytics (Figure 4).

“The interaction between humans and machines is critical for the development of AI-powered solutions. Machines empower humans; humans teach machines to become better”

Marc Steffen, Head of Product Design, Artificial Intelligence & Machine Learning Group, Swisscom

As they do, they expect to achieve a number of benefits. These include not only cost advantages (57 percent) but also improved data analysis and intelligence (50 percent) and more revenue opportunities (50 percent). Swiss companies also expect AI to facilitate interaction with user interfaces, ensuring a more human experience (79 percent) and accelerating technology adoption throughout the organization (78 percent).

However, to realize benefits like these, they also recognize that they’ll need to address some important issues: data quality (43 percent), prohibitive costs (38 percent) and integration issues with existing IT infrastructures (37 percent).

“We’ve entered an age where consumers will soon expect almost any business from whom they buy goods and services, to also let them speak instead of only scrolling or swiping”

Alexey Popov, CEO, Spitch

Figure 4: Top AI Technology by investment over the next 3 years

(% of respondents saying their organizations plan extensive investments in these AI-related technologies)

	 MACHINE LEARNING	 RPA	 COMPUTER VISION	 DEEP LEARNING	 NATURAL LANGUAGE PROCESSING	 VIDEO ANALYTICS	 EMBEDDED SOLUTIONS*
CH	38%	29%	31%	37%	30%	32%	28%
EUROPE	34%	36%	32%	33%	30%	28%	35%
GLOBAL	37%	37%	36%	33%	32%	31%	38%

■ **TOP 3 TECHNOLOGIES**

Note: Results based on % of respondents who answered their companies are “extensively” or “moderately” investing in these technologies over the next three years.

* For example, IPsoft’s Amelia embedded into call center services; IBM Watson embedded in healthcare diagnostics

ACTIONS TO TAKE. NOW.

1. Confirm your data strategy and the AI tools to make the most of it.
2. Understand the skills you’ll need to use AI – not just to automate but also for human interaction
3. Pilot AI in customer-facing roles to accompany end-customers along their various journeys.

TREND 2

ECOSYSTEM

POWERPLAYS

The business landscape is evolving as companies increasingly integrate their core business functionalities with third parties and their platforms.

Eighty-six percent of Swiss executives say that these digital ecosystems are altering or transforming the way their organization delivers value and around three-quarter are taking steps to participate in digital ecosystems (Figure 5).

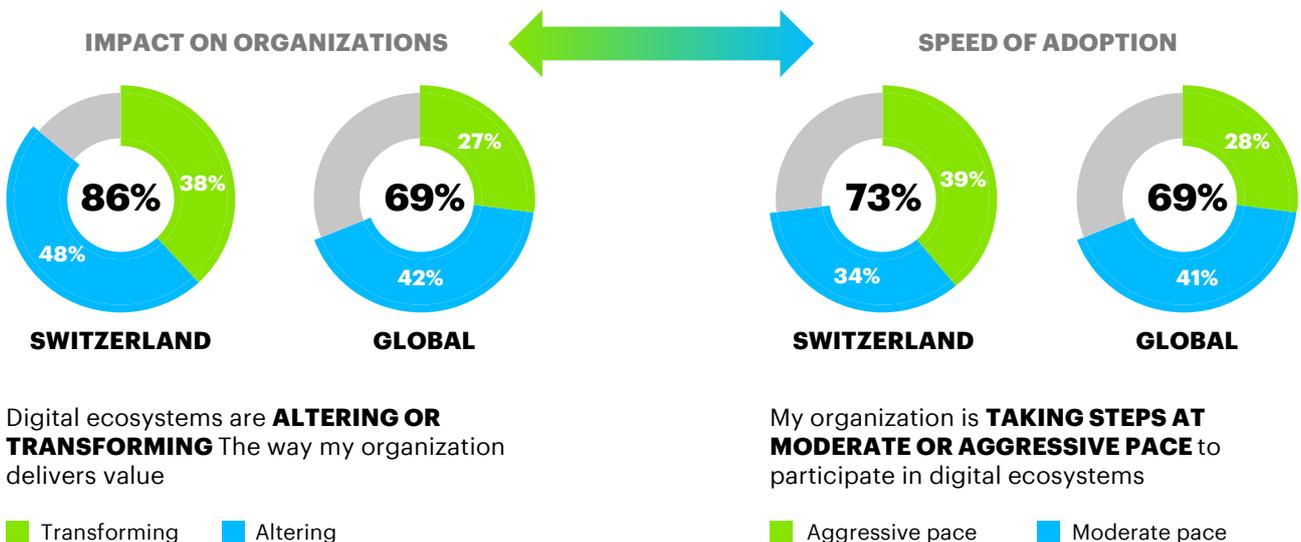
As more companies join this 'platform revolution', how leaders choose to build their portfolio of digital partners is more important than ever.

Seventy-eight percent of Swiss executives think that their companies' competitive advantage will not be determined by their organization alone, but by the strength of the partners and ecosystems they choose.

Each time an enterprise leverages a third-party platform to support aspects of its business, it is, in fact, choosing the alliance partners it will depend on when building its next generation of services. In our research, Swiss executives cited the top benefits of participation in a digital ecosystem as: increased agility (49 percent), improved customer satisfaction (46 percent) and the ability to innovate (46 percent). Examples in the Swiss market mirror our survey findings. We've recently seen a number of strategic partnerships and businesses taking steps toward digital ecosystems in pursuit of different objectives.

One such strategic partnership has been forged by Novartis and Qualcomm to develop a connected version of an inhaler for chronic obstructive pulmonary disease⁹ (COPD), due for launch by 2019.

Figure 5: Digital Ecosystems impact and organizations' speed of adoption



The product will be connected to Qualcomm Life's 2net platform and patient data will be wirelessly sent to a mobile application, which in turns sends the data to the cloud, allowing patients – and potentially healthcare providers – to monitor their COPD.

It's not just complementary technologies that provide the foundation for strategic partnerships. Access to expertise can also be a driving factor. Siemens Building Technologies division, headquartered in Zug, and IBM have initiated a partnership¹⁰ focused on real estate management. They aim to develop technology for Siemens' Navigator platform by leveraging IBM's big data analytics and IBM Watson functionalities and combine IBM real estate software "TRIRIGA" with Siemens' energy efficiency services.

Strategic partnerships are not the only kind of ecosystem powerplay. Consumer-facing companies are harnessing new platforms – like WhatsApp and Siri – to improve interactions with existing clients and attract new ones.

Creating completely new ecosystems to connect with customers can drive higher sales, improve customer service, and create differentiated customer experiences.

Logitech, for example, has worked closely with Amazon to enable consumers to use Alexa to control their smart homes. The company developed an Amazon Alexa "skill" that integrates voice control with the Logitech Harmony hub-based remote¹¹.

However, participating in digital ecosystems also means new challenges. In this context, Swiss executives' concerns are mainly about uncertainty and disruption (25%), finding the best partners (23%) and cybersecurity (23%). To address these challenges, companies need to define a compelling digital ecosystem strategy, keeping their brands relevant and increasing opportunities to deliver value.

ACTIONS TO TAKE. NOW.

1. Determine the platforms you rely on most, as well as those that most depend on you. Focus strategic and marketing activities accordingly.
2. Align with your digital partners on future common opportunities and define a strategic plan.
3. Develop metrics to monitor your digital ecosystem participation (sales growth, customer satisfaction etc.) and adjust your ecosystem strategy based on results.

TREND 3

WORKFORCE MARKETPLACE

Changes in the technological landscape, coupled with ever-intensifying competition, not only influence how companies serve their clients but also how they shape their workforce strategies. No surprise, then, that Swiss executives identify organizational models as a major challenge.

Seventy-six percent of them acknowledge their organizations are under extreme competitive pressure to extend innovation to the workforce, and 78 percent report that corporate bureaucracies are stifling productivity and innovation.

These findings show how legacy structures and current management models constrain innovation. Something needs to change. If they don't take action, Swiss companies will face a digital skills shortage.

A recent study by ICT Switzerland¹² highlights that by 2024 Switzerland could face a shortage of around 25,000 IT specialists. This rises to 35,600 if immigration restrictions are enforced.

In response, companies are looking beyond the boundaries of their organizations to increase workforce effectiveness, agility and innovation. Our study highlights, for example, that while today 18 percent of Swiss companies' workers are independent freelancers (Figure 6), 94 percent of companies plan to increase their use of freelance workers over the next year.

The main benefits for Swiss companies? Access to high-demand skills, knowledge and/or experience (50 percent) and increased innovation through dynamic teaming (48 percent).

The increasingly important role of freelancers in the marketplace is driving the growth of on-demand labor platforms. In the last few years, several of these have launched in Switzerland.

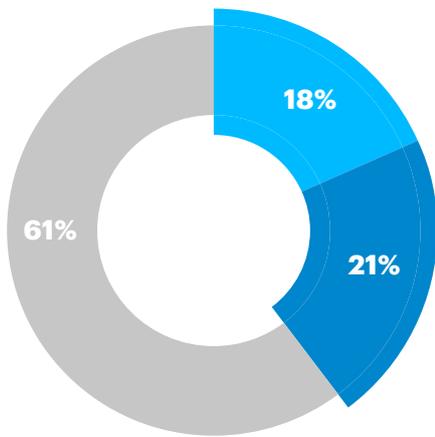
This includes international players such as Upwork, which posts three million jobs globally per annum; Onforce, which is focused on field services and was acquired by Adecco in 2014, and also Swiss start-ups like Fective, which aims to improve the way project teams are created¹³. Thirty percent of Swiss executives say they already use on-demand labor platforms across their organization and 54 percent use them for selected business units.

We believe this points to a wider trend. In the future, organizations will apply lessons from incorporating on-demand labor to drive larger transformations. This will power the development of a corporate marketplace where people are hired not to fill a fixed position, but to dynamically support project-based teams with their specialist skills and knowhow.

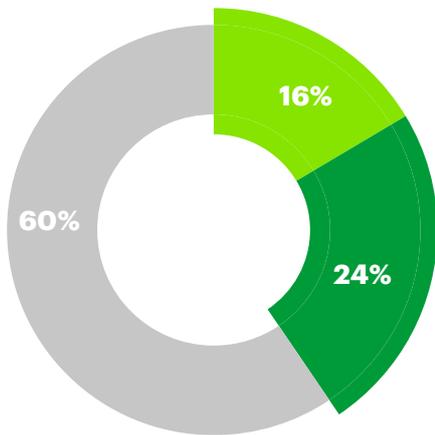
“Fast and flexible access to knowledge, skills and extended workforce are key for companies to keep up with competition”

Andy Kobelt, CEO, f e ctive

Figure 6: Swiss Companies' Workforce by type of employees



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- Independent freelance workers
- Employees via outsourcing contracts
- Internal Employees

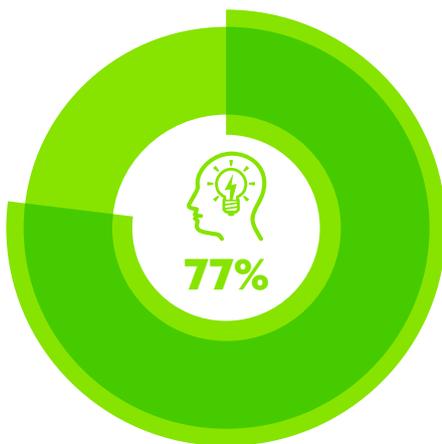
Note: Average percentage related to answers to the following question: Please estimate the percentage of your business unit, department or division's current workforce that falls into each of the following categories.



This evolution to a more flexible, digital workplace could create huge benefits for Swiss companies. One study¹⁴ indicates that it could generate CHF 15.5 billion per year (around 2% of GDP) thanks to lower costs and higher productivity. However, increasing performance should not be its sole objective. By allowing employees to work in a more liquid way, leveraging digital communication tools and working remotely, a digital workplace also improves job satisfaction.

Our research highlights that companies moving their workforce strategy in this direction will gain considerable advantages. Seventy-seven percent of Swiss executives agree that organizations that can build a strong liquid workforce will win the war for talent and 79 percent say that the innovation it provides will deliver competitive advantage (Figure 7).

Figure 7: Advantages of Liquid Workforce



SWISS EXECUTIVES who believe that organizations that are able to build a **STRONG LIQUID WORKFORCE** will win the **WAR ON TALENT**



SWISS EXECUTIVES who believe that organizations that are able to successfully integrate a **LIQUID WORKFORCE** into their business model will gain a **SIGNIFICANT COMPETITIVE ADVANTAGE** through innovation.

ACTIONS TO TAKE. NOW.

1. Define your talent marketplace strategy for the digital age: evaluate skills gaps, technology tools, freelance labor platforms, etc.
2. Identify piloting opportunities within the organization to create a more agile workforce.
3. Establish KPIs to track how pilots align and support business priorities.



TREND 4

DESIGN FOR HUMANS

Technology is increasingly supporting employees and customers to accomplish goals and reach desired outcomes. It's of paramount importance, therefore, to enhance technologies with an understanding of how people actually behave.

By using the large amount of data they have about their customers and employees, companies can better understand attitudes to technology, and how people work with it. Designing technology that adapts to human behavior can confer significant competitive advantage. Business leaders in Switzerland recognize this. More than two-thirds believe that by understanding customers' objectives and designing tools to meet them, organizations transform themselves from provider to partner.

Becoming a partner to customers increases their loyalty. It also enables a business to accompany customers toward their present and future goals. To do this, 77 percent of Swiss executives agree that organizations need to understand not only where people are today, but also where they want to be tomorrow. They can then use this understanding to shape technology that can guide people to their desired outcomes.

That's what one Zurich-based start-up, Fashwell¹⁵, is doing in the fashion sector. It's leveraging visual recognition and deep-learning technologies to recognize fashion items in any web image and provide shoppable links to customers, all within a matter of seconds. It works with fashion brands and retailers to eliminate the need for customers to go through multiple clicks to purchase items. It achieves this by rapidly understanding what customers want, delivering what they're looking for, and closing the gap between their preferences and what e-commerce can achieve.

Combined with the findings from our research, examples like this show that Swiss executives, in general, recognize the importance of shaping the quality of the customer journey and the

effectiveness of technology solutions to meet people's unique needs. Seventy-eight percent of executives believe that organizations that can truly tap into what motivates human behavior, and design the customer experience accordingly, will be the next industry leaders. Moreover, 38 percent of them (vs 31 percent globally) say that their organizations plan over the next three years to make extensive use of information, regarding human behavior and tendencies, to guide the development of new customer experiences and relationships (Figure 8).

“The future of search and communication is about pictures. That's why Fashwell is continuously developing the best possible image recognition technology that makes online shopping as fast, easy and as "human" as in store”

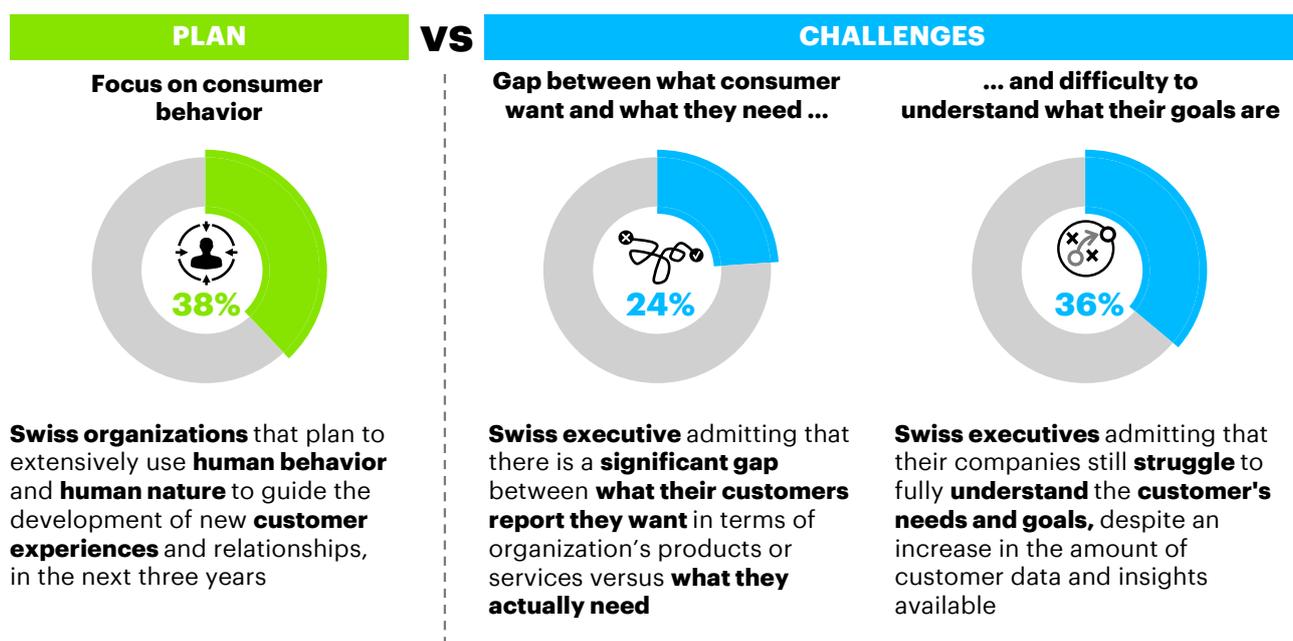
Matthias Dantone, CEO & Co-Founder, Fashwell

However, building technology for humans is easier said than done. Understanding what customers want is rarely straightforward. Twenty-four percent of Swiss executives (vs 17 percent globally) admit that there is a significant gap between what their customers report they want (in terms of an organization's products or services) versus what they need. Companies also face challenges in making the optimal use of all the data they now have at their disposal: 36 percent believe that

despite an increase in the amount of customer data and insights available, their companies still struggle to fully understand customers' needs and goals (Figure 8).

There's a long journey ahead. But to get started, companies need to focus on making their technologies more agile, adaptable and responsive to customer needs. Success depends on putting people, not technology, first.

Figure 8: Building Human Technologies: Plans vs Challenges



ACTIONS TO TAKE. NOW.

1. Understand how clients use channels while interacting with your products/services and how human behavior positively or negatively affects these interactions
2. Catalog the data that offers insights into customer behavior and decision-making. Create a plan to collect additional relevant data.
3. Use the customer behavior insights you already have to plan a pilot for a behavioral-personalized experience with an existing product or service

TREND 5

THE UNCHARTED

By innovating through digital products and services, companies are not simply improving their customer offerings; they're reshaping completely new digital industries.

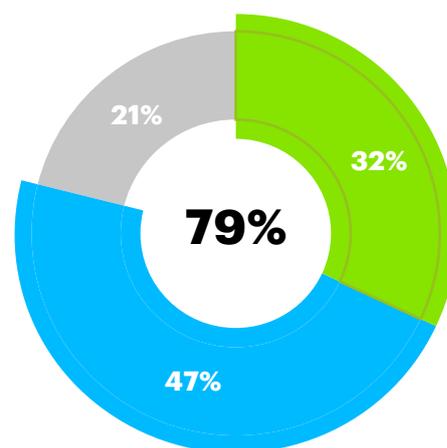
Seventy-nine percent of Swiss executives (73 percent globally) agree, saying that their companies are entering entirely new, as yet undefined, digital industries (Figure 9).

This journey into the unknown poses some serious challenges in terms of regulation, as the accelerating pace of digital change modifies competitive dynamics, blurs industry boundaries and creates completely new competitive relationships. Swiss companies feel this regulatory uncertainty more acutely than their global peers. Seventy-five percent of Swiss executives (vs 65 percent globally) believe that regulation has not been able to keep pace with technological development.

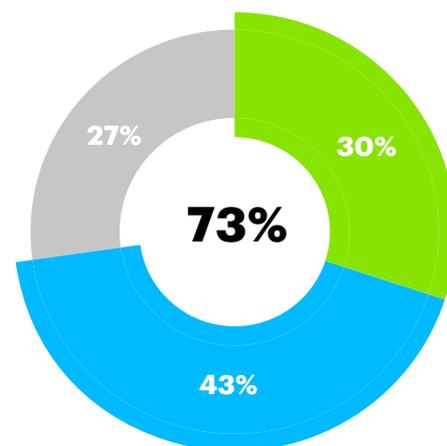
Additionally, 81 percent (vs 66 percent globally) believe that their companies' innovation efforts fall into a regulatory gray area (Figure 10).

It's clear from this that a broad scope of new rules has yet to be defined. Companies, now more than ever, have an opportunity to participate in that process. They can bring their expertise and enhance their collaboration with other companies and regulators to define the new directions for uncharted business terrains and set the rules of nascent industries.

Figure 9: My organization is entering entirely new digital industries that have yet to be defined



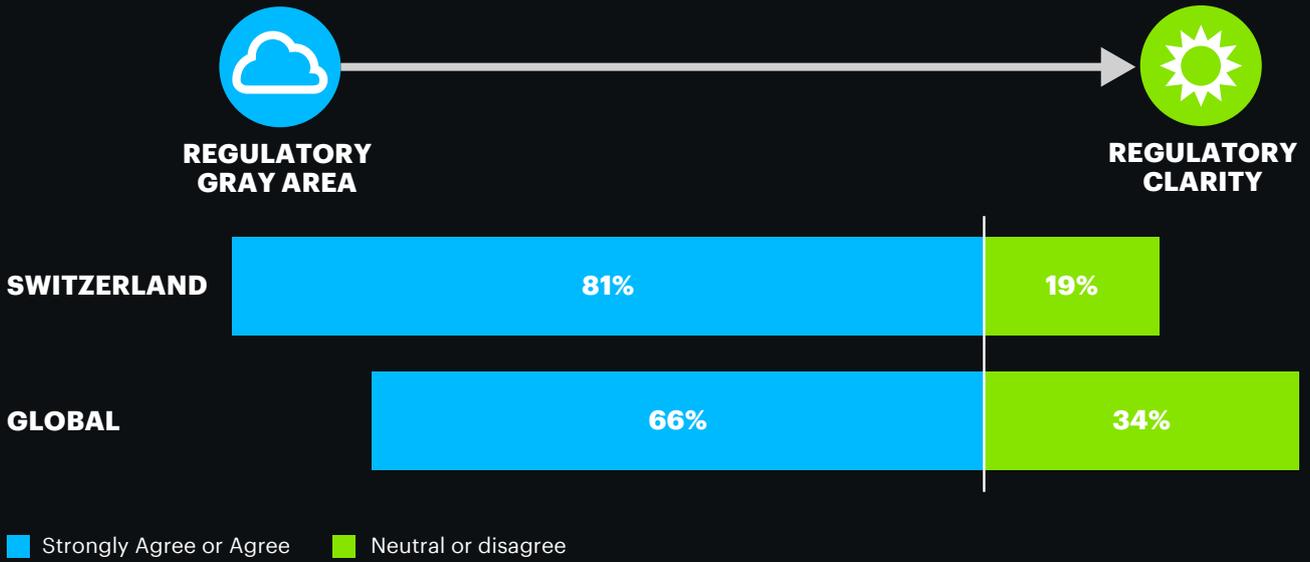
SWITZERLAND



GLOBAL

■ Strongly Agree ■ Agree ■ Other

Figure 10: My organization is entering entirely new digital industries that have yet to be defined



Accordingly, 81 percent of Swiss executives (76 percent globally) believe their company has a duty to inform and educate lawmakers on technologies critical to their business. In fact, 57 percent (37 percent globally) said their organization has already joined a technology consortium to set the rules for their industry and an additional 40 percent are considering doing so. UBS and Credit Suisse, for example, despite being rivals in Switzerland and internationally, joined both R3 and Enterprise Ethereum Alliance (EEA)¹⁶, two consortia aiming to develop distributed ledger (blockchain) technology solutions for the banking industry.

Other Swiss companies are also taking important steps toward cross-industry collaboration that can help to define emerging sectors. Digital Switzerland¹⁷ is one. It's a cross-industry association that brings together more than 70 members who have decided to help drive the country's digital transformation. How? By engaging with policymakers, supporting the growing Swiss ecosystem and providing digital education programs that help individuals to refresh and upskill their digital business capabilities.

Swiss executives clearly see engaging with regulators as critically important in gaining public support (86 percent of Swiss executives agree, versus 79 percent at the global level). The benefits they perceive from doing so include: opportunities for trusted partnerships (57 percent); developing standards that competitors will be expected to follow (57 percent) and allowing companies to participate in multiple markets and reduce their revenue variations (52 percent).

Taking a passive role in new markets is not a viable option and could even be dangerous. A report by Gartner¹⁸ asserts that: "by 2020, your company will either lead a digital business in an industry you have created or be part of one created by someone else...if you are still in business."

Ultimately, companies need to adapt their role in a number of ways. As highlighted in Accenture's 2017 Top 500 Study¹⁹, they need to have an integrated strategy where growth and profitability must be paired with corporate citizenship and sustainability. But more than this, they also have to take an active role in their market and assume greater responsibility for improving the society in which they operate. To do this, they need to use and share their expertise to help drive positive change in the new, uncharted world.

"Companies were already working with society and regulators for a long time. Digitalswitzerland is bundling all these efforts and with the resulting network effects provide a far greater impact, which is necessary giving the pace of the digital transformation of our society"

Nicolas Bürer, Managing Director,
digitalswitzerland



ACTIONS TO TAKE. NOW.

1. Understand relevant areas of innovation where an update of government regulation or industry rules could help to support innovation and economic growth.
2. Build a strategy for responsible and ethical influence of the social contract and ecosystem(s) in which you play a part.
3. Create a team to work with regulators to help shape a correct environment for growth that fosters innovation, rather than stifling it.

THE DIGITAL ERA'S NEW MANTRA: "PEOPLE FIRST"

The themes described in this report represent the newest expression of Accenture's "People First" view of the changing digital landscape. As our research shows, Swiss companies are embracing digital change, but they must evolve further to fully capture its value.

Viewed as a whole, Accenture's Technology Vision provides a guide for how Swiss companies should evolve. To be a leader, it's not enough to incorporate new technologies – however effectively that is managed. Something more is needed. Companies need to shape a role for themselves in the next evolution of business and society, by empowering people to do things that would once have been unimaginable, and become their partner for everyday life.

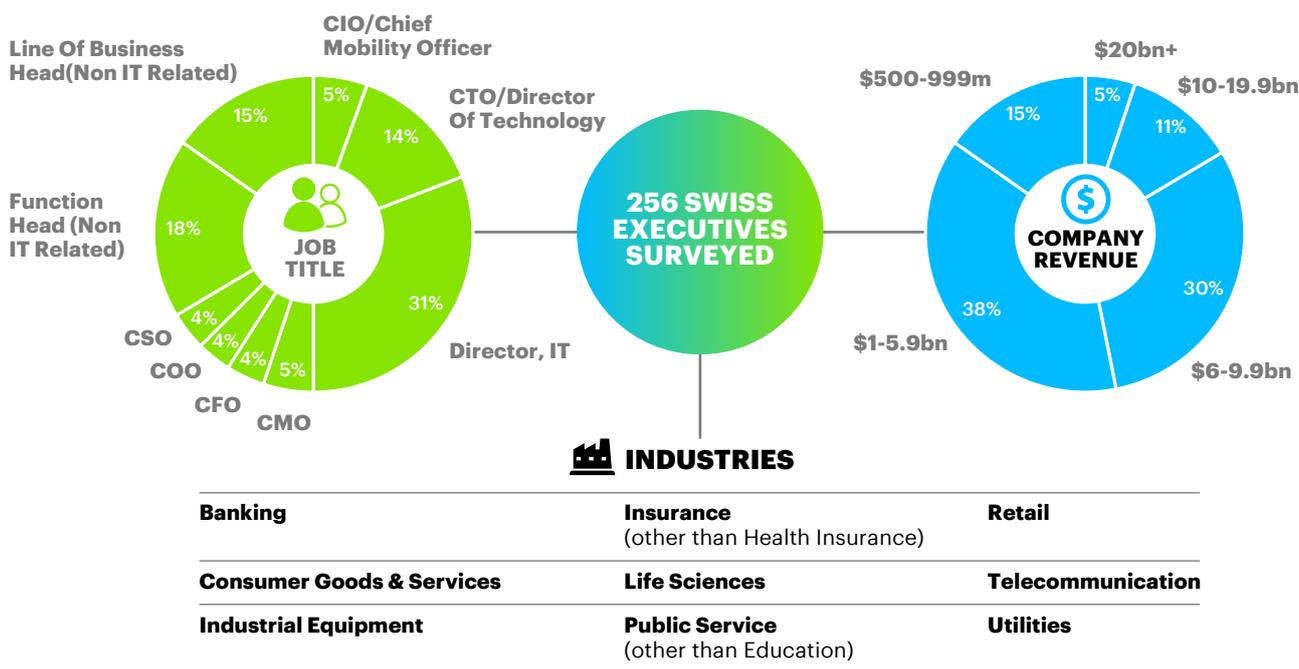
Companies that are able to embrace a "People First" mindset will realize consistent and long-lasting benefits – both for themselves and for society as a whole.

ABOUT ACCENTURE TECHNOLOGY VISION

Every year, the Technology Vision team partners with Accenture Research to pinpoint the emerging IT developments that will have the greatest impact on companies, government agencies, and other organizations in the next three years. The research process begins with gathering input from the Technology Vision External Advisory Board, a group comprising more than two dozen experienced individuals from the public and private sectors, academia, venture capital, and entrepreneurial companies. In addition, the Technology Vision team conducts interviews with technology luminaries and industry experts, as well as nearly 100 Accenture business leaders from across the organization.

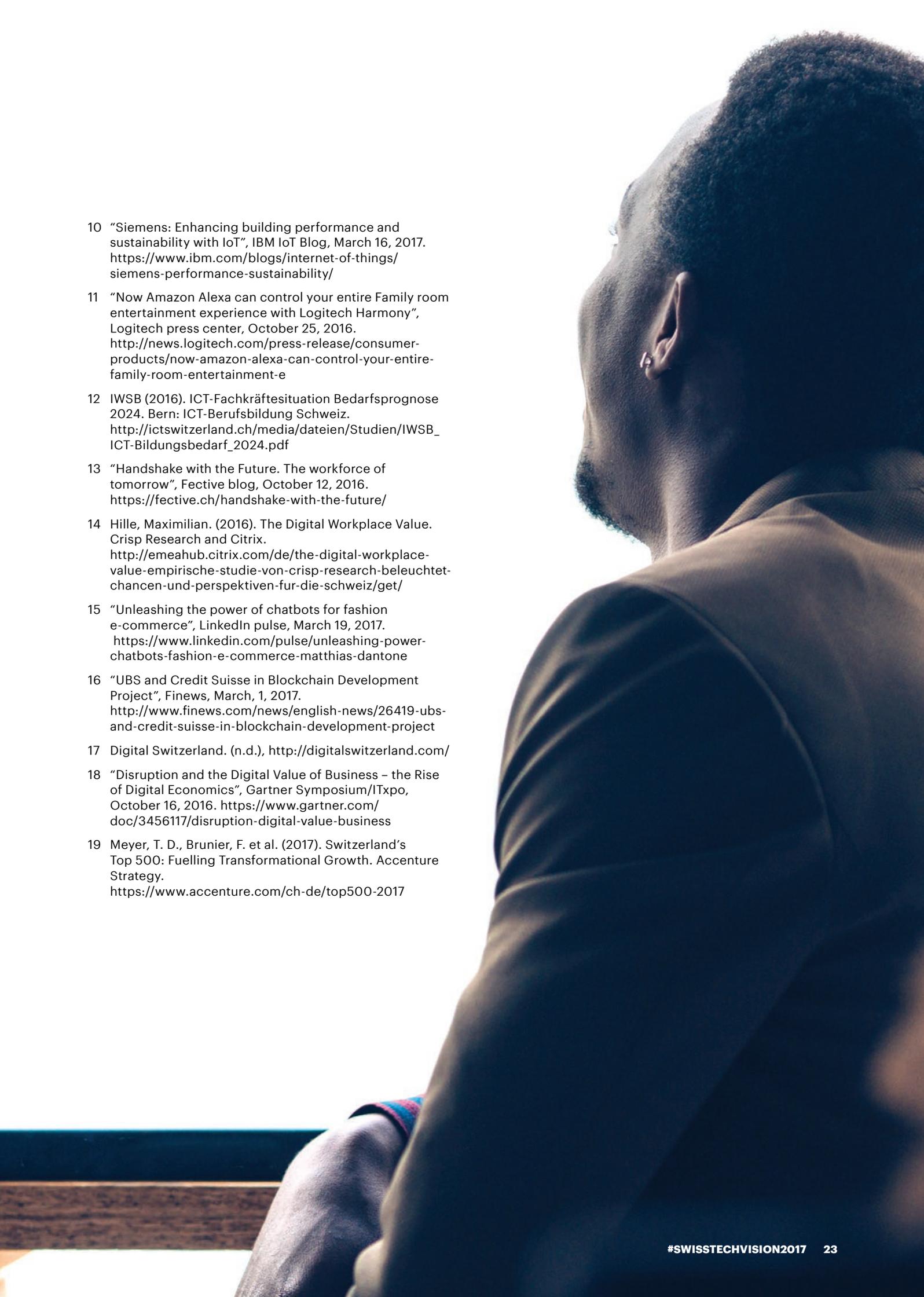
The team also taps into the vast pool of knowledge and innovative ideas from professionals across Accenture, using Accenture’s collaboration technologies and a crowdsourcing approach to uncover the most interesting emerging technology themes. Nearly 3,000 participants actively engaged in the campaign. Finally, for the third year, we conducted a global survey of more than 5,400 business and IT executives across 31 countries to understand their perspectives on the impact of technology on their organizations, and to identify their priority technology investments over the next few years. The survey was fielded from November 2016 through January 2017. The Swiss data, referred to in this report, is based on responses from the 256 executives in Swiss companies included in the global panel.

Figure 11: Survey Demographics for Switzerland



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ABOUT THE AUTHORS

MARC ZOLLINGER

Accenture Technology Lead in Switzerland
marc.zollinger@accenture.com

MAURO CENTONZE

Accenture Research Manager
mauro.centonze@accenture.com

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