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Tech Trends 2020

BREAKFAST E-ROUNDTABLE, 28TH MAY 2020

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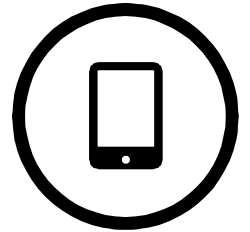


Tech Trends 2020

BREAKFAST E-ROUNDTABLE, 28TH MAY 2020

 Mentimeter

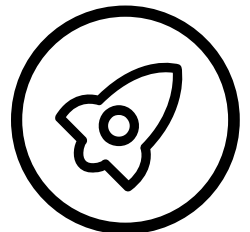
1 GRAB YOUR PHONE



2 FLASH THE QR CODE



3 YOU'RE GOOD TO GO!



Your Host Today



Daniel Schlegel

Technology Strategy & Transformation Partner
Deloitte Switzerland, Consulting

Your Moderator Today



Peter Sany

Executive CIO Advisor

Deloitte Switzerland, Consulting

Welcome and Introduction

08:30	Welcome and Introduction	Daniel Schlegel & Peter Sany	Deloitte
08:40	COVID-19 & its impact	Achim Baumstark Alexander Bockelmann Wolfgang Eger Peter Sany	Helvetia Baloise Swiss Post Deloitte
09:00	Introduction to Tech Trends 2020	Hans Van Grieken	Deloitte
09:20	Panel discussion and Q&A	Achim Baumstark Alexander Bockelmann Wolfgang Eger Hans Van Grieken Peter Sany	Helvetia Baloise Swiss Post Deloitte Deloitte
10:00	End of the session		

Panellists & Presenters



Achim Baumstark
CTO
Helvetia Insurance



Alexander Bockelmann
Group CIO
Baloise



Wolfgang Eger
CIO
Swiss Post



Hans Van Grieken
Author Tech Trends
Deloitte



Peter Sany
Executive CIO Advisor
Deloitte



Daniel Schlegel
TS&T Partner
Deloitte



Achim Baumstark

CTO

Helvetia

Achim studied computer science and computer engineering at University of Karlsruhe in the 1980s. He has been Chief Technology Officer for Helvetia since 1st of April 2017.

Before that he worked in various managerial positions for Helsana und Zurich Insurance and Daimler AG. He started his career with Andersen Consulting in the early 1990s.

In total, Achim has 30 years of experience in IT functions across a wide variety of industries.



Alexander Bockelmann

Group CIO
Balaise

Alexander Bockelmann is a German national and has a PhD in geosciences. After studying in Germany and the UK, he completed a doctorate at the University of Tübingen's faculty of geosciences.

Dr Bockelmann is a proven expert in digitalisation and transformation, and has many years of experience in the industry. He previously worked as an IT strategy and transformation consultant at the Boston Consulting Group and in various senior roles at Allianz SE in Germany and the USA.

At the end of 2013, he moved to UNIQA Insurance Group AG in Austria in the role of Group CIO and ultimately became Chief Digital Officer on the Management Board.



Wolfgang Eger

CIO

Swiss Post

Wolfgang Eger is a computer scientist and graduated from McKinsey's MBA programme in Williamstown (USA) as well as completed the Leadership and Organizational Change course at Harvard Business School, Boston (USA).

Mr. Eger has been Chief Information Officer at the Swiss Post since 1st of February 2019. Prior to this role, he spent 15 years in multiple managerial positions at Swisscom and he worked for companies such as Lufthansa, EDS and McKinsey.

He has many years of experience in managing and developing large ICT organisations and has broad knowledge of the various IT functions from consulting, architecture, software engineering, security to operations.



COVID-19 & its impact

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CIO Statement two Weeks after 'Shutdown' order

LinkedIn March 30, 2020



Achim Baumstark • 1.
CTO at Helvetia Insurance
18 Std. • 🌐

Helvetia successfully shifted most of its workforce to home office. All aspects of our business, including customer support, even project work - all delivered from a decentral workforce working from home. Enabled by technology. I'm very proud of our teams at IT&FM@Helvetia. Just wanted to say "thank you"! [#HelvetiaIT](#) [#workreallysmart](#)



Donald Desax • 2. 17 Std. ...
Mit Leidenschaft gemeinsam mit eine...

Achim you and your team did a real great job to enable our home-office! I'm so glad to have such a strong and customer focused IT-Team delivering me with IT-services. Thanks a lot, really well done!

[Übersetzung anzeigen](#)

👍 • 6 Gefällt mir | 💬



Michel Molinari MRICS • 2. 17 Std. ...
Chief Investment Officer bei Helvetia...

Great job & stay healthy!

[Übersetzung anzeigen](#)

👍 • 1 Gefällt mir | 💬



Jens Beba • 2. 16 Std. ...
Associate Partner, Head Insurance, in...

Impressive team performance, [Achim Baumstark](#) & the whole Helvetia IT!

[Übersetzung anzeigen](#)

👍 • 3 Gefällt mir | 💬



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Hans Van Grieken

EMEA Technology Research & Insights Leader
Deloitte Center for the Edge

Hans van Grieken is an associate to Deloitte's global CIO program and part of Deloitte's global Emerging Tech Executive Council. He is the lead or co-author of a number of recent Deloitte global and regional digital transformation research papers, amongst them 9 shifts that are changing the Digital Technology Operating Model of the Future.

Deloitte Insights on COVID-19

Deloitte.

Services ▾ Industries ▾ Insights ▾ Careers ▾

Search



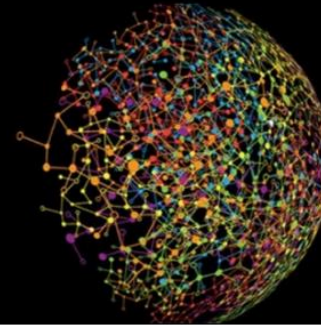
GLOBAL-EN ▾



Combating COVID-19 with resilience

Leaders like you are responding to one of the most sweeping crises in recent memory, calling for both empathy and action to guide your people and businesses through uncertain times. This page gathers Deloitte's global insights to help you not only respond to this crisis, but recover and thrive.

Need help? [Connect with our team](#)



Deloitte Insights

The heart of resilient leadership: Responding to COVID-19

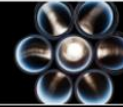
A guide for senior executives



Perspectives

Resources for resilient leadership

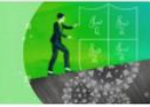
Explore actions within the three key phases of crisis: respond, recover, thrive



Analysis

COVID-19: Managing supply chain risk and disruption

Coronavirus highlights the need to transform traditional supply chain models



Deloitte insights

Potential implications of COVID-19 for the insurance sector

How the coronavirus outbreak may impact insurers operationally and economically



Perspectives

Leading virtual teams

Eight principles for mastering virtual leadership of teams

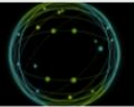
Our latest thinking



Article

COVID-19 Economic cases: Scenarios for business leaders

Outlooks on the economy, society, and more for resilient leaders



Analysis

COVID-19 Government Response Portal

Navigating the complex landscape of governmental assistance



Perspectives

The world remade by COVID-19

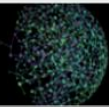
Planning scenarios for resilient leaders



Article

ConvergeHEALTH Connect for Crisis Response

Using AI in the fight against COVID-19



Perspectives

COVID-19 and the board: A chair's point of view

Five principles of a strong board during crisis

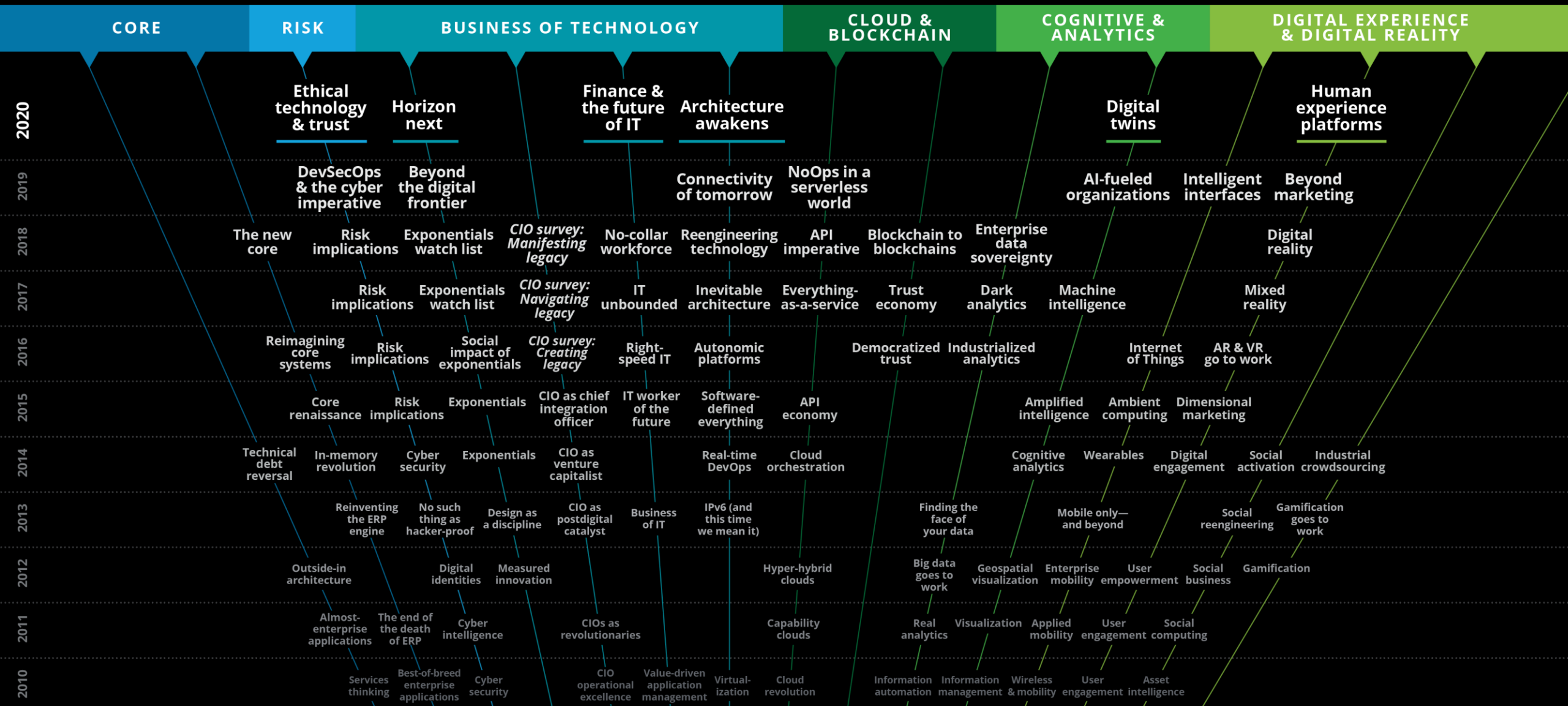


Perspectives

COVID-19: Navigating volatility and distress

Addressing the financial impact of COVID-19

Trending the trends: Eleven years of research



Tech Trends 2020



MACRO TECHNOLOGY FORCES

Exploring technology trends individually is no longer enough to stay ahead—organizations are deploying them in concert to create a foundation for innovation that can propel their business into the future.

ENABLERS

Digital experience, analytics, cloud

FOUNDATION

Business of technology, risk, core modernization

DISRUPTORS

Digital reality, cognitive, blockchain

HORIZON NEXT

Ambient experience, exponential intelligence, quantum



ETHICAL TECHNOLOGY AND TRUST

Leaders who align tech ethics with organizational values—and apply them across the investment lifecycle—are demonstrating a commitment to “doing good” that can build a long-term foundation of trust with stakeholders.



HUMAN EXPERIENCE PLATFORMS

Leading organizations are using affective computing to create systems that recognize a user's emotional state and the context behind it, and then respond appropriately—adding an emotional quotient (EQ) to technology's IQ.



FINANCE AND THE FUTURE OF IT

As enterprises become more agile, companies are exploring new approaches to budgeting, contracting, and capital planning to fuel innovation and usher in a new, flexible approach to funding technology investments.



ARCHITECTURE AWAKENS

Established companies with legacy systems have begun moving architects out of their silos and into the trenches. The goal? Create the kind of architectural agility that is a competitive differentiator in the digital economy.



DIGITAL TWINS: BRIDGING THE PHYSICAL AND DIGITAL

High fidelity digital simulations combined with IoT sensors and machine learning are presenting a host of new opportunities ranging from optimization to autonomous decision-making to new business models.



HORIZON NEXT: A FUTURE LOOK AT THE TRENDS

What big technology shifts could emerge over the next decade? Deliberately sensing and evaluating emerging technologies can help guide today's business and technology decisions and create a strong foundation for the future.



Macro technology forces

Exploring technology trends individually is no longer enough to stay ahead—organizations are deploying them in concert to create a foundation for innovation that can propel their business into the future.

ENABLERS

FOUNDATION

DISRUPTORS

DIGITAL EXPERIENCE

BUSINESS OF TECHNOLOGY

DIGITAL REALITY

From channel to human-centered design

Reengineering "capital T" Technology

Reimagining engagement

ANALYTICS

RISK

Cyber, regulatory, and ethics

COGNITIVE

Data management, architecture, and insights

Predict, prescribe, augment, and automate

CLOUD

CORE MODERNIZATION

PLATFORMS

Flexibility and ubiquity

Reshaping the heart of the business

Distributed trust and assets

ENABLERS

FOUNDATION

DISRUPTORS

HORIZON NEXT

DIGITAL EXPERIENCE

From channel to human-centered design

BUSINESS OF TECHNOLOGY

Reengineering "capital T" Technology

DIGITAL REALITY

Reimagining engagement

AMBIENT EXPERIENCE

Transparent, ubiquitous interfaces

ANALYTICS

Data management, architecture, and insights

RISK

Cyber, regulatory, and ethics

COGNITIVE

Predict, prescribe, augment, and automate

EXPONENTIAL INTELLIGENCE

Symbolic, deep, and broad reasoning

CLOUD

Flexibility and ubiquity

CORE MODERNIZATION

Reshaping the heart of the business

PLATFORMS

Distributed trust and assets

QUANTUM

Exponential computation



Human experience platforms

Leading organizations are using affective computing to create systems that recognize a user's emotional state and the context behind it, and then respond appropriately—adding an emotional quotient (EQ) to technology's IQ.

Reshaping human-machine connections through AI, neuroscience, and human-centred design. We've reached a point in the digital revolution at which everyone's connected to technology but not necessarily to each other...

Consumers crave what they are rapidly losing: **meaningful connections**

In response, we increasingly expect technology to treat us in more human—and humane—ways.

Create customised, emotionally intelligent experiences using technologies like **machine learning, voice response, and image recognition.**

EMOTIONALLY INTELLIGENT EXPERIENCES

- Authenticity
- Personally relatable
- Storylines that resonate
- Trustworthiness
- Intuits user wants and needs in the moment

DEFINITION

a-'fek-tiv / computing

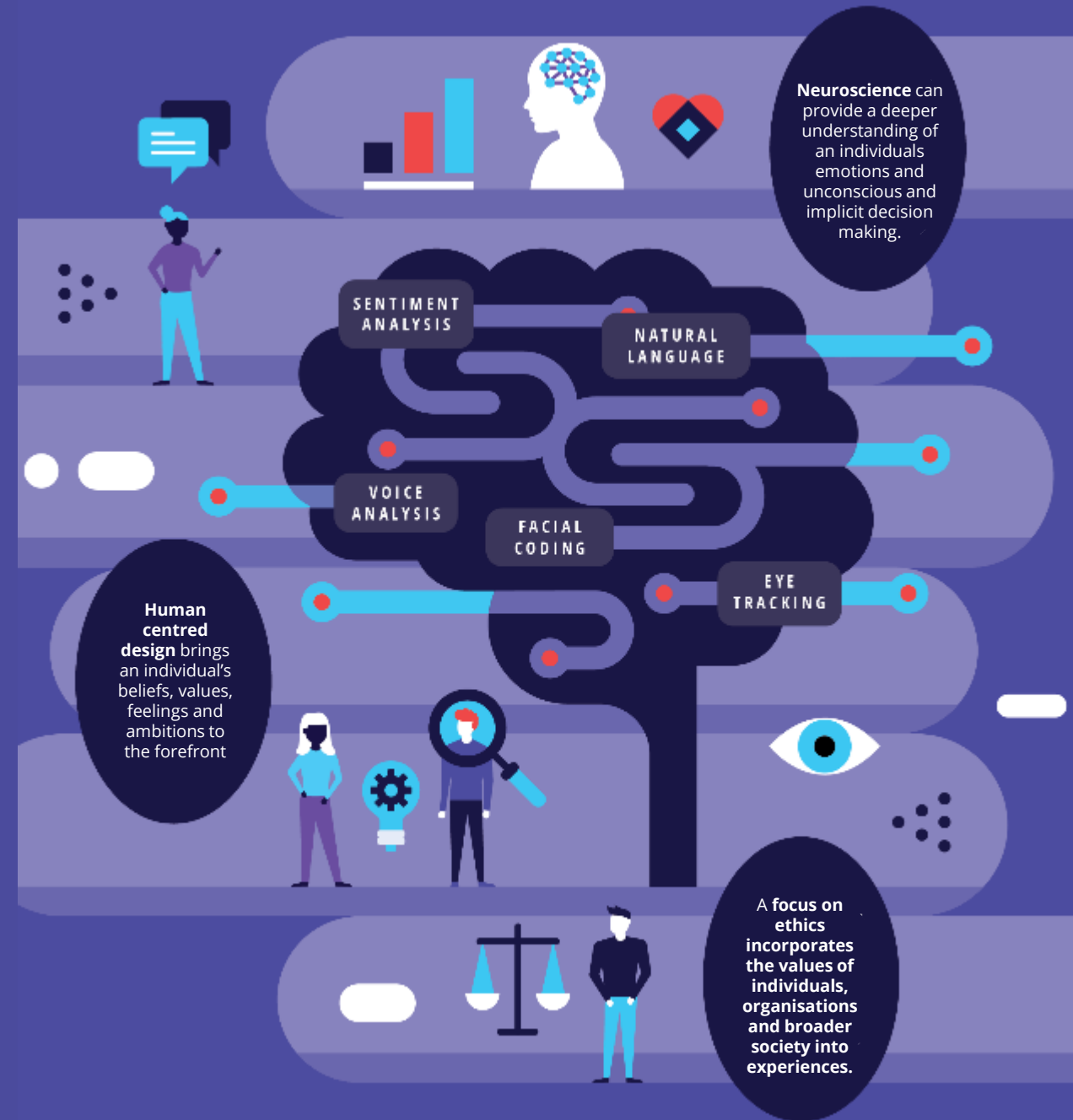
Computing that relates to, arises from, or deliberately influences emotion or other affective phenomena

BY THE NUMBERS



Of long-term customers in a Deloitte Digital survey use emotional language to describe their connection to favoured brands

TREND BREAKDOWN



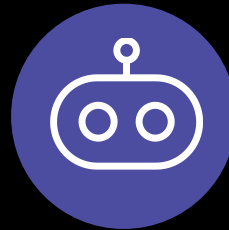
The trend in action



UBS



EMOTIV



IPsoft



Anthem



Ethical technology and trust

Leaders who align tech ethics with organizational values—and apply them across the investment lifecycle—are demonstrating a commitment to “doing good” that can build a long-term foundation of trust with stakeholders.

Every aspect of an organization disrupted by technology represents an opportunity to gain or lose stakeholders' trust. Leaders are approaching trust not as a compliance or PR issue but as a business-critical goal.

IN PURSUIT OF TRUST

- Encode your company's values
- Build a strong data foundation
- Harden your defenses
- Respect privacy and be transparent
- Respect differing cultural norms

ONE MORE THING

Empower your people.

Since technology is arguably used by most if not all individuals within an organization, ethical technology and trust is a topic that touches everyone.

TREND SUMMARY

In a time of constant tech disruption, earning trust is a 360-degree challenge—and opportunity.



DEFINITION

e-thi-kəl / technology

An overarching set of values that direct an organization's approach to its use of technologies as a whole and the ways in which they are deployed to drive business.

BY THE NUMBERS



of respondents in a Deloitte study from high-growth companies are highly concerned about the ethical ramifications of technologies, compared to only 27% of low-growth companies.*

TREND BREAKDOWN



*Timothy Murphy et al., *Ethical technology use in the Fourth Industrial Revolution*, Deloitte Insights, July 15, 2019.

The trend in action



**Providence St.
Joseph Health**



CIBC



Abbott



Google



**David Danks, PhD,
Carnegie Mellon
University**



Finance and the future of IT

As enterprises become more agile, companies are exploring new approaches to budgeting, contracting, and capital planning to fuel innovation and usher in a new, flexible approach to funding technology investments.

This does not mean replace annual budgeting cycles with a shiny, unproven alternative. **Balancing fiscal control and appropriate spending with value creation and financial results** is a nonnegotiable requirement. There are **multiple approaches** that can help maintain the balance:

- Change **within finance**
- Change **within IT**
- **Creative funding**



POTENTIAL PROBLEMS

1. Shifting from Capex to Opex
2. Measuring elusive ROI
3. Calculating Value delivered

OPTIMISE IMPACT?

- Risk-based portfolio Mindset
- Capex versus Opex strategy
- Capacity-based funding
- Digital Foundations

DEFINITIONS

'a-jəl

A synonym for "nimble"; the ability to respond gracefully to a need to change and adapt

'A-jəl

An iterative, incremental software delivery methodology

BY THE NUMBERS



Of CIOs expect to implement Agile, DevOps, or a similar flexible IT delivery model to help spur broader innovation ambitions

TREND BREAKDOWN



FUNDING
INNOVATION
AT THE SPEED
OF AGILE

Move the IT organisation to a product-focused operating model and create a roadmap for tech investments

CHANGE WITHIN IT

CREATIVE FINANCE

Explore opportunities for strategic co-investment, ecosystem subsidies, carveout leasebacks, and other models

Tailor budgeting, funding, and reporting processes to meet the evolving needs of the business

CHANGE WITHIN FINANCE

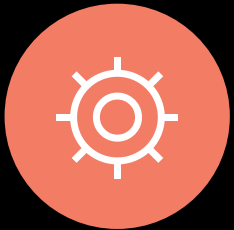
IT NEEDS

Cross-functional teams
Flexible timelines
Product focus

FINANCE NEEDS

Value calculation
Measurable ROI
Fiscal control

The trend in action



**Nationwide
Building Society**



Barclays



Rolls-Royce



**Delta
Air Lines**



Digital twins: Bridging the physical and digital

High fidelity digital simulations combined with IoT sensors and machine learning are presenting a host of new opportunities ranging from optimization to autonomous decision-making to new business models.

Imagine that you had a perfect digital copy of the physical world: a digital twin. This twin would enable you to collaborate virtually, intake sensor data and simulate conditions quickly, understand what-if scenarios clearly, predict results more accurately, and output instructions to manipulate the physical world

EXAMPLES



Automotive & Aircraft

Used to optimise entire manufacturing value chains and innovating new products



Energy

Oil field service operators are capturing and analysing massive amounts of in-hole data that they use to build digital models that guide drilling efforts in real time



Health Care

Cardiovascular researchers are creating highly accurate digital twins of the human heart for clinical diagnoses, education, and training



Smart Cities

Singapore uses a detailed virtual model of itself in urban planning, maintenance, and disaster readiness projects

DEFINITION

di-jə-tʃl / twin

BY THE NUMBERS

38%

TREND BREAKDOWN



PHYSICAL TWIN

DIGITAL TWIN



The trend in action



Airservices Australia



Bridgestone



**Takeda
Pharmaceuticals**



**San Diego Association
of Governments**



**Wing Wong, Stanford
University**
**Xuegong Zhang, Tsinghua
University**



**National Crime
Agency**



Network Rail



Architecture awakens

Established companies with legacy systems have begun moving architects out of their silos and into the trenches. The goal? Create the kind of architectural agility that is a competitive differentiator in the digital economy.

With technology architecture growing in strategic importance, we expect to see more **architects playing a large role in system operations**—and joining software development teams that are designing complex technology

- **Architecture** - a strategic priority setting new standards for agility, availability, functionality, and scalability.
- **The architect** - redefining the role to be more collaborative, creative, and responsive to stakeholder needs.

ARCHITECTS GO BIG



A big metric of success for architects is that enterprise teams **want** to work with them.

Unfortunately, in some IT organisations architects **rarely work shoulder to shoulder** with their business or even IT peers.

DEFINITION

är-kə-tek

Individuals responsible for the design, implementation and oversight of technology components, applications and infrastructure and their respective interactions. Deep experts in their domains, they are responsible for finding a path to the future.

BY THE NUMBERS



of Deloitte Tech Execs Dbriefs webcast respondents said their organisation has skilled architects in sufficient quantity; 54% report gaps in skills or headcount

TREND BREAKDOWN



The trend in action



**InterContinental
Hotels Group**



**Thomson
Reuters**



**National
Australia Bank**



**Amazon Web
Services**



Horizon next: A future look at the trends

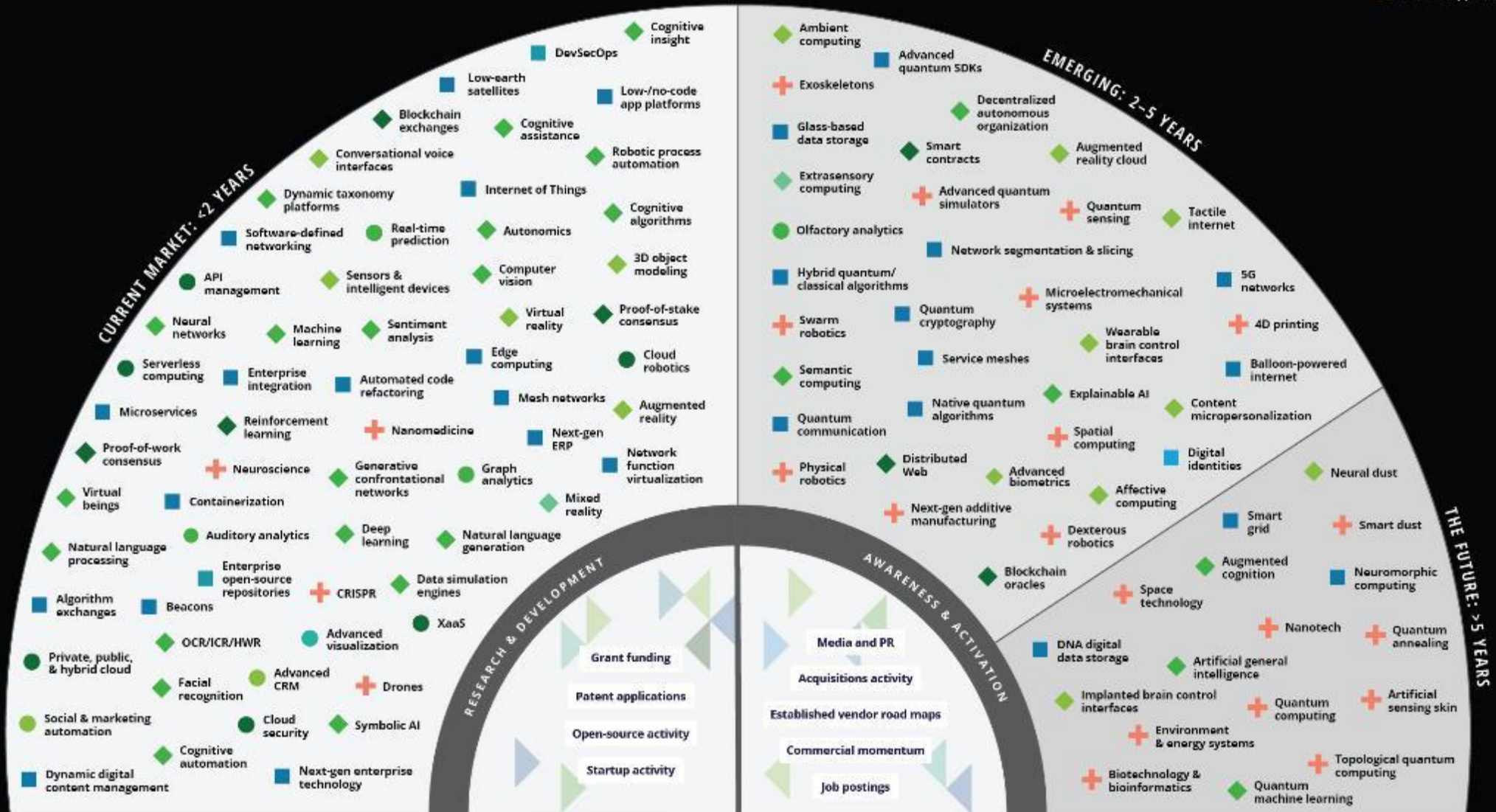
What big technology shifts could emerge over the next decade? Deliberately sensing and evaluating emerging technologies can help guide today's business and technology decisions and create a strong foundation for the future.

Horizon next

MACRO FORCES

- ◆ Digital experience
- Business of technology
- ◆ Digital reality
- Analytics
- Risk
- ◆ Cognitive
- Cloud
- Core modernization
- ◆ Blockchain

+ Science & applied technologies



Panel discussion and Q&A

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Tech Trends 2020

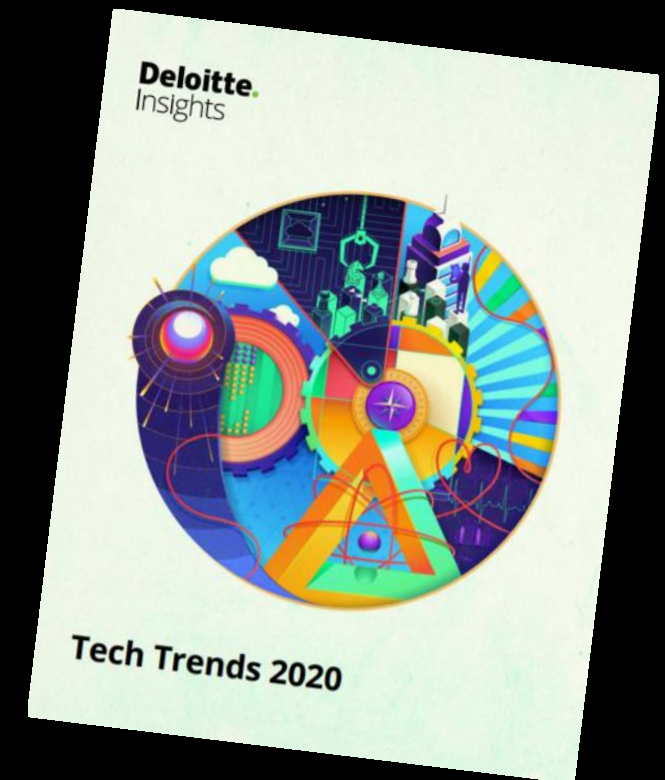
Keeping pace with the emerging technology landscape can be difficult for even the most tech-savvy leaders.

Find out more

- Read the [Executive Summary](#) for an overview of the report (*8 minutes*)
- Watch the Tech Trends 2020 [video](#) (*2 minutes*)
- Download the [full report](#)

Questions? Or a deeper dive?

Contact the team at TechTrends@deloitte.com.



End of the Session

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The kinetic leader:

Boldly reinventing the enterprise

2020 Global Technology Leadership Study

FORESEEN ON JUNE 25TH 2020

Deloitte's biennial tech leadership study shows how, faced with unprecedented uncertainty, businesses now more than ever need their technology leaders to be *kinetic*—resilient, agile, and future-focused.

www.deloitte.com/tech-leader-study



Deloitte.



Thank you!

TECH TRENDS 2020 - BREAKFAST E-ROUNDTABLE, 28TH MAY 2020



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