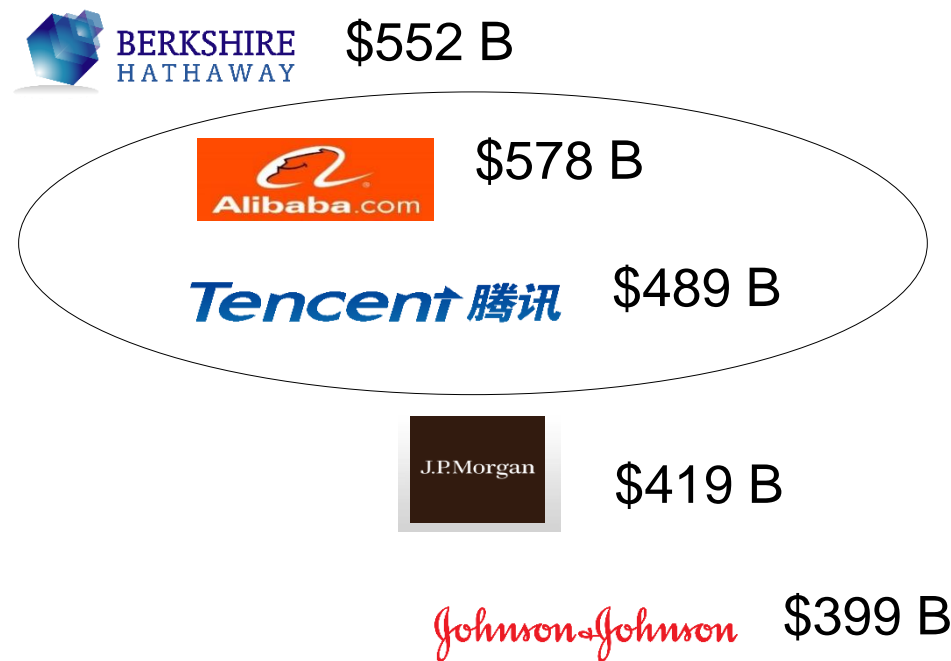
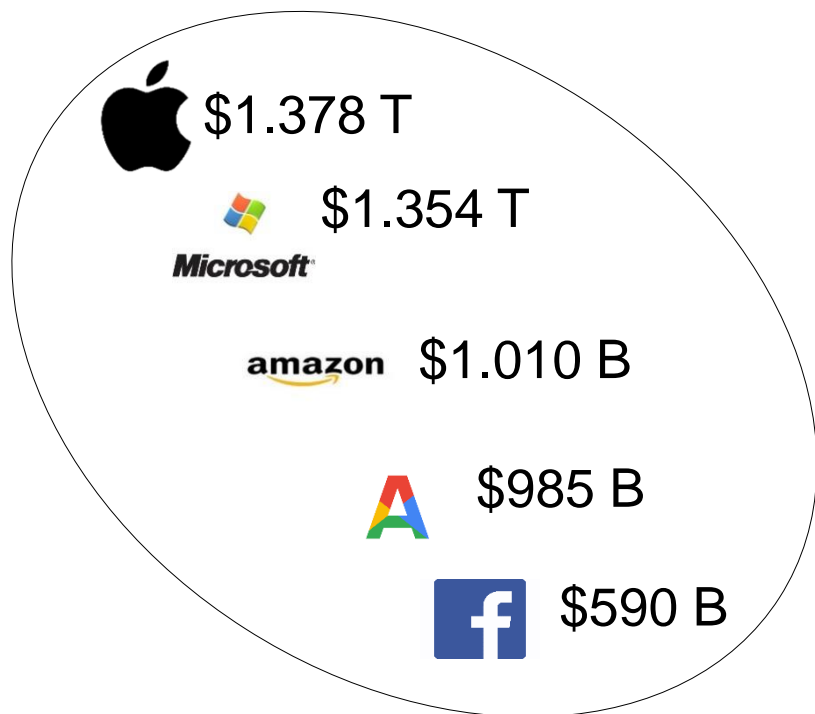


Digital in Practice



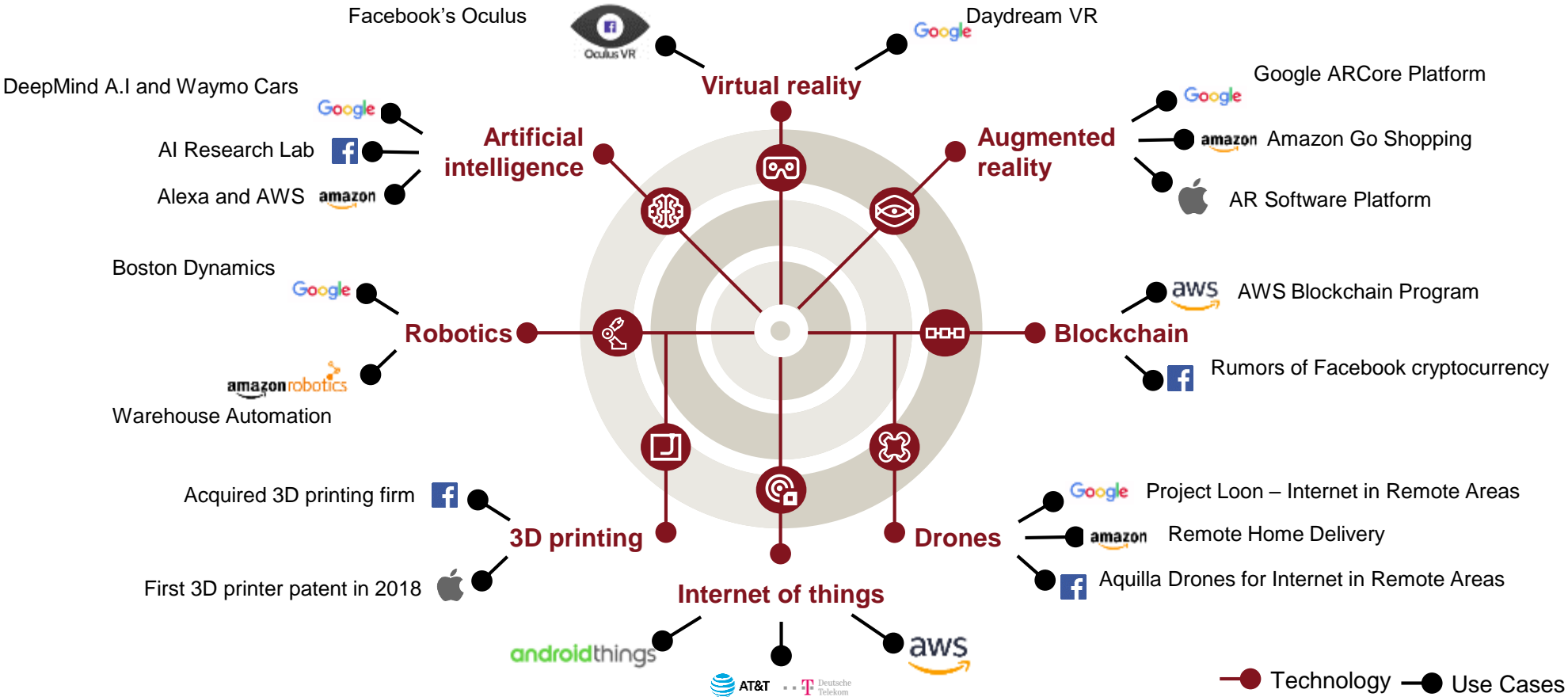
Technology companies are now the most dominant companies in the world

Market cap of top ten most valued companies 3/2/2020



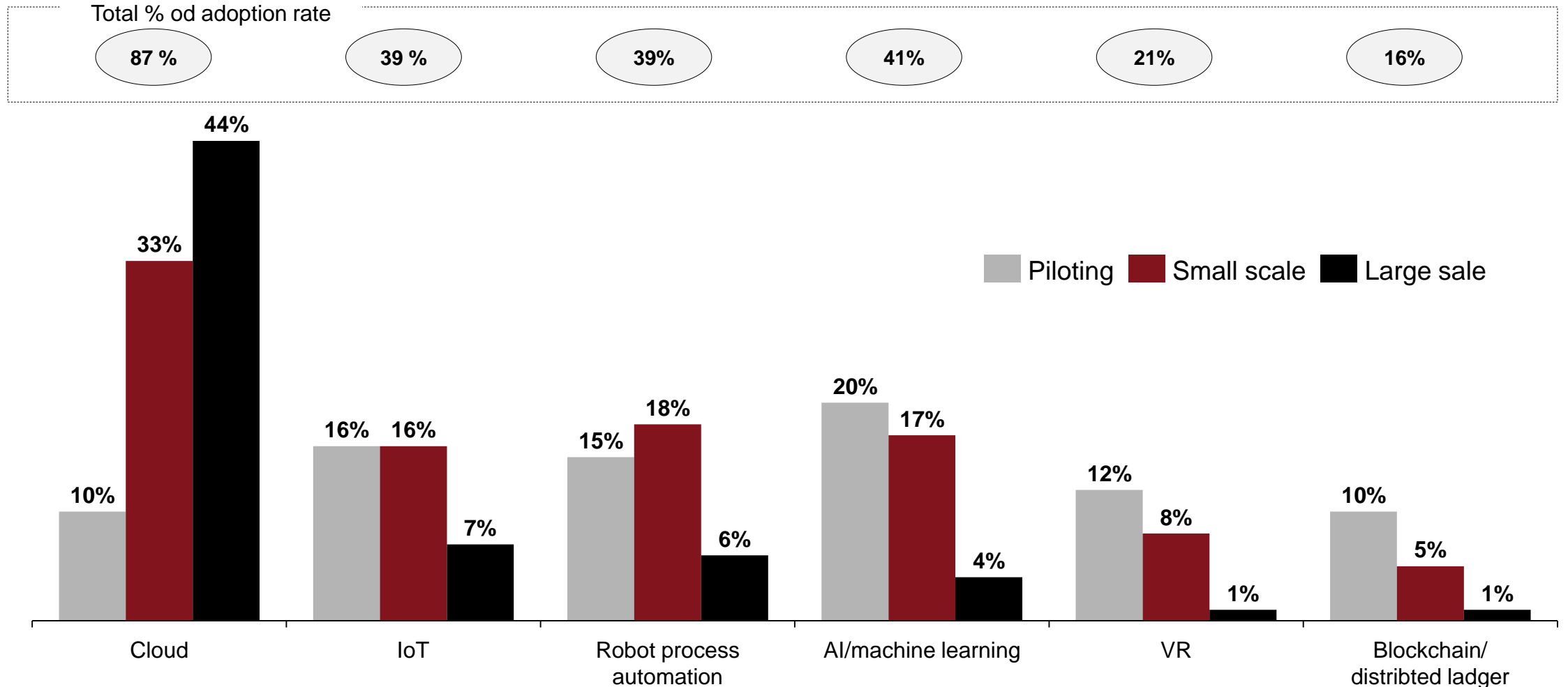
The essential 8 technologies are expected to transform society in the near future

Essential 8 Technologies

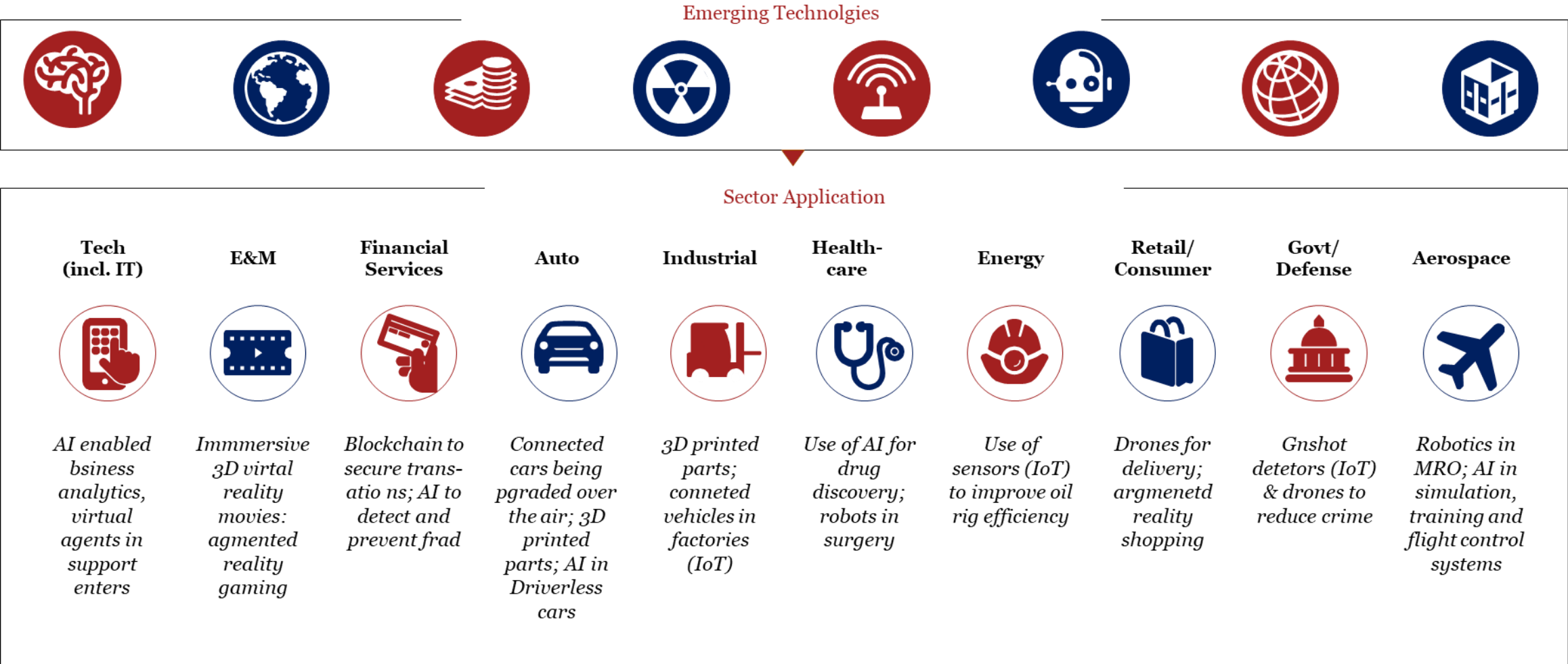


Source: Strategy & analysis

AI is quickly gaining track and overtaking longer present technologies

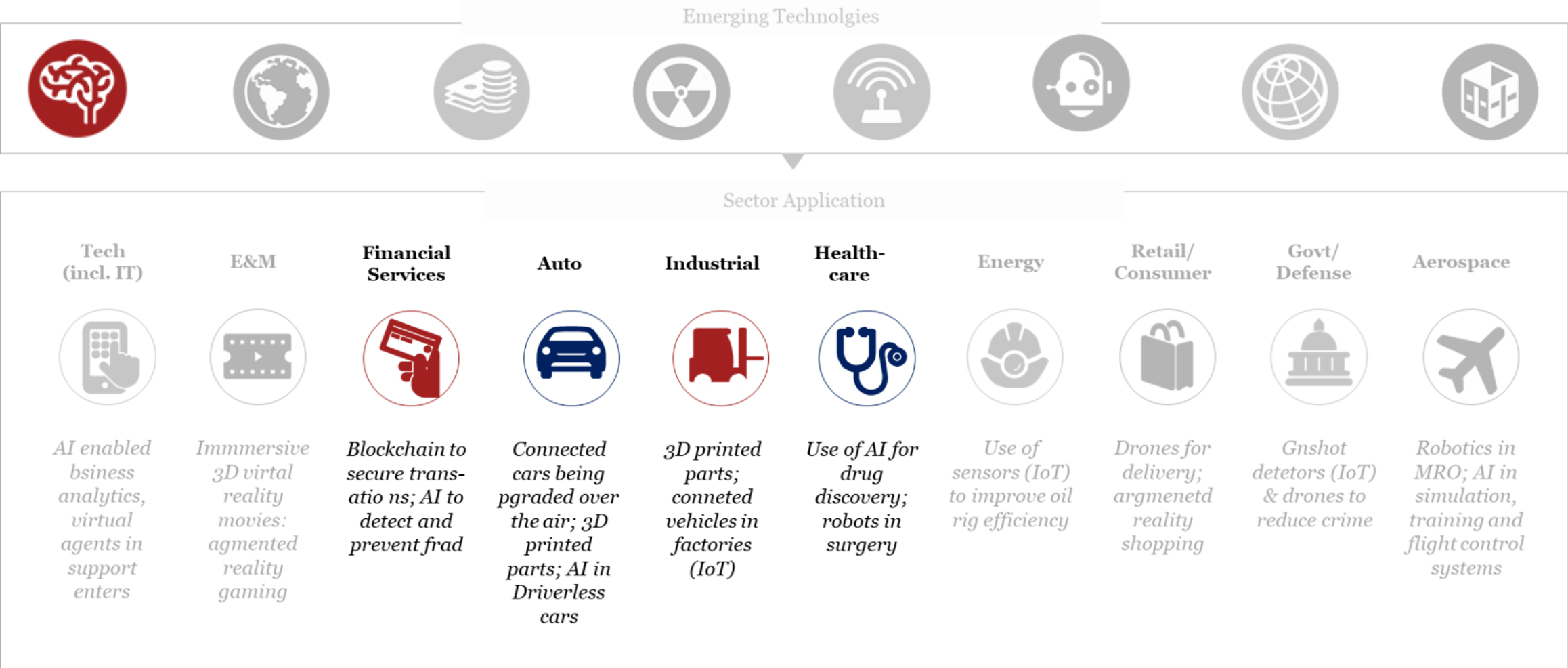


The impact of Essential Eight is felt across multiple sectors



Source: PwC analysis

The impact of Essential Eight is felt across multiple sectors



Source: PwC analysis

AI is poised to become the next big technological shift in almost every industry

Global Pharmaceutical



Extracting adverse drug interaction from clinician notes, social media, and medical literature to enhance **productivity and effectiveness (96% accuracy)**

Construction company



Monitoring of construction site completion status and asset tracking using deep learning **decreased operational cost by 60%**

Automotive Manufacturer



Auto Manufacturer evaluated over **200,000 go-to-market scenarios** to launch rideshare and autonomous vehicle **multibillion dollar business unit**

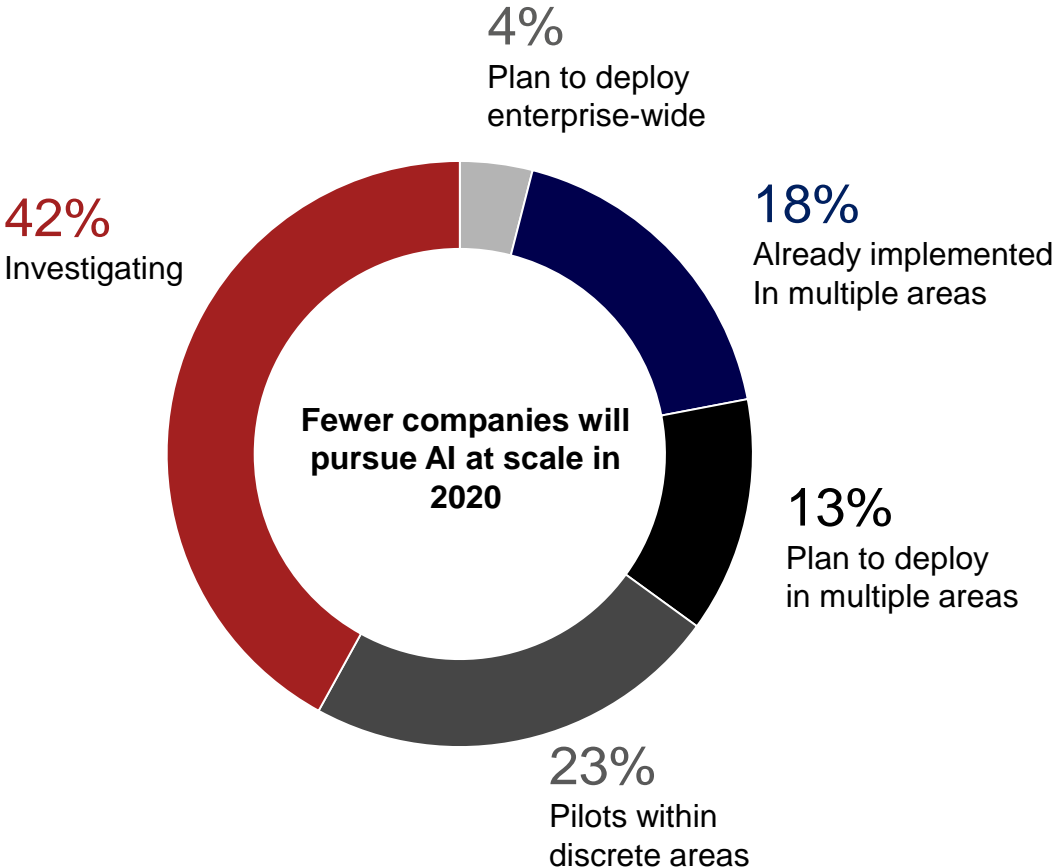
Financial Advisor



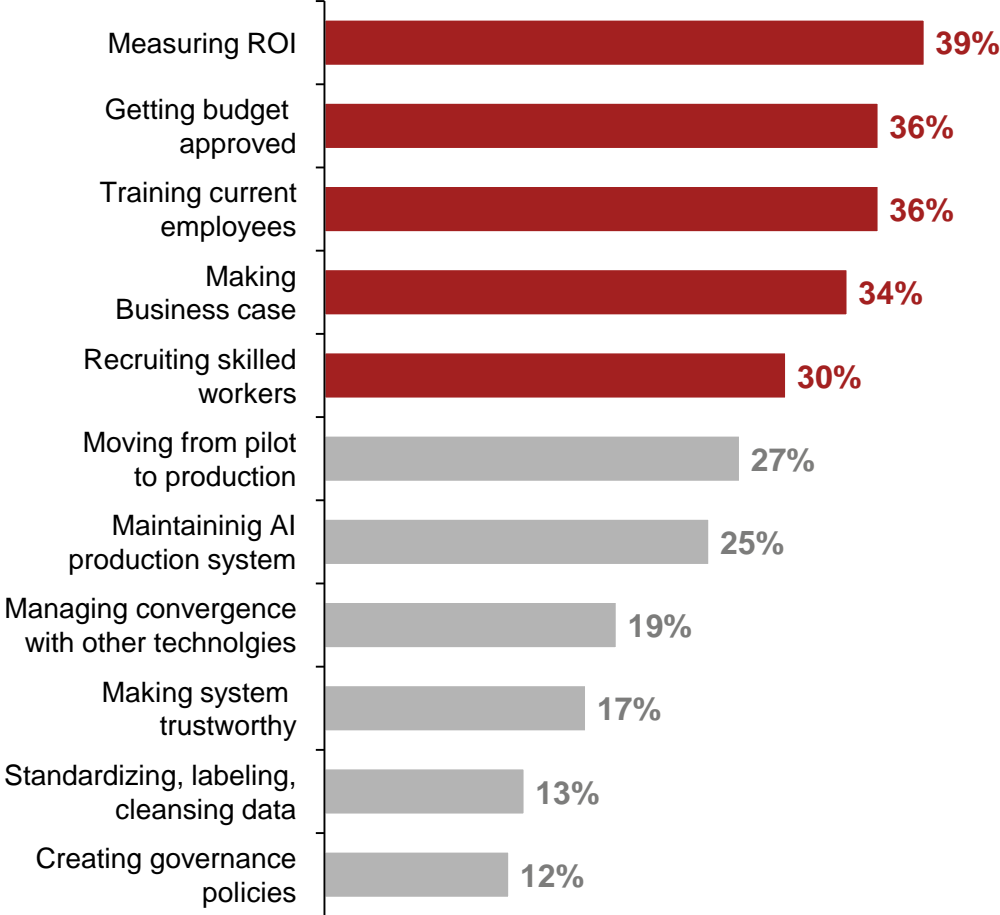
Digital advisor that simulates household level (128 million) financial data into the future to enhance **financial wellness**

The biggest AI challenges aren't about technology

AI implementation status



Top AI-related priorities in 2020

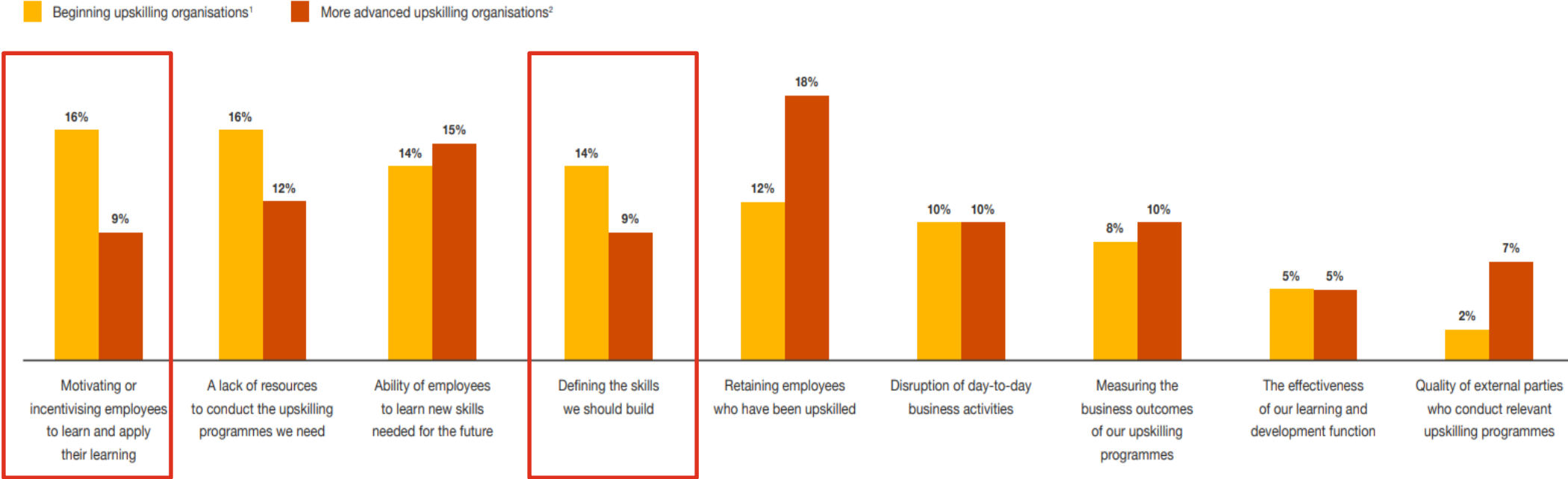


Source: PwC 2020 AI Predictions Survey, sample size 1062

PwC's 23rd Annual Global CEO Survey shows that Even though identified as important, upskilling is difficult

Last year, upskilling was identified as the most important way to close the skills gap.

18% of CEOs this year cite significant progress



Source: PwC, 23rd Annual Global CEO Survey
 1. 'Beginning upskilling organisations' refers to the bottom quartile of CEOs regionally who have reported the least progress in upskilling
 2. 'More advanced upskilling organisations' refers to the top quartile of CEOs regionally who have reported the most progress in upskilling
 Note: Upskilling relates to an organisation's clear intent to develop its employees' capabilities and employability, and to advance and progress their technical, soft and digital skills.
 Base: 'Beginning' and 'more advanced' upskilling organisations (beginning=411; more advanced=353)

Case examples

Retail, Industrial,
Healthcare

“

"We recognised early on that the digital transformation does not always mean that we need to do away with the old business model!"

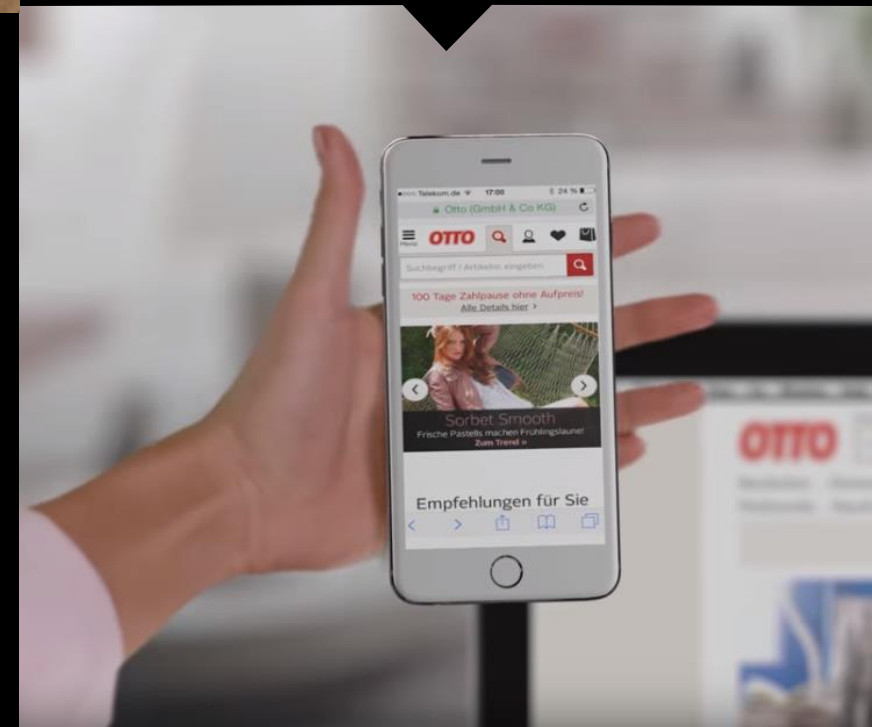
Marc Opelt, Member of the OTTO Management Board



Established 1949



97 percent of all Otto purchases nowadays are made online



Many of Otto's competitors — such as Neckermann — didn't change fast enough and are now no more.

Improve existing

New applications

Platforms & business models

Solve problems that we could not solve effectively solve before ...

...where there is not really comparable solution in the past

HeardThat
More Voice. Less Noise.

ORCAM



It works with your hearing aids or earphones, to get you back in the conversation.

AI-powered hearing aid that combines lip reading with simultaneous voice source separation.

The app uses an algorithm to help separate speech from background noise.



“

Cartonboard industry group that went full digital and is now making remarkable revenues out of it.

“Mayr-Melnhof digital” – first digital sales and service channel in cartonboard industry



Established 1888



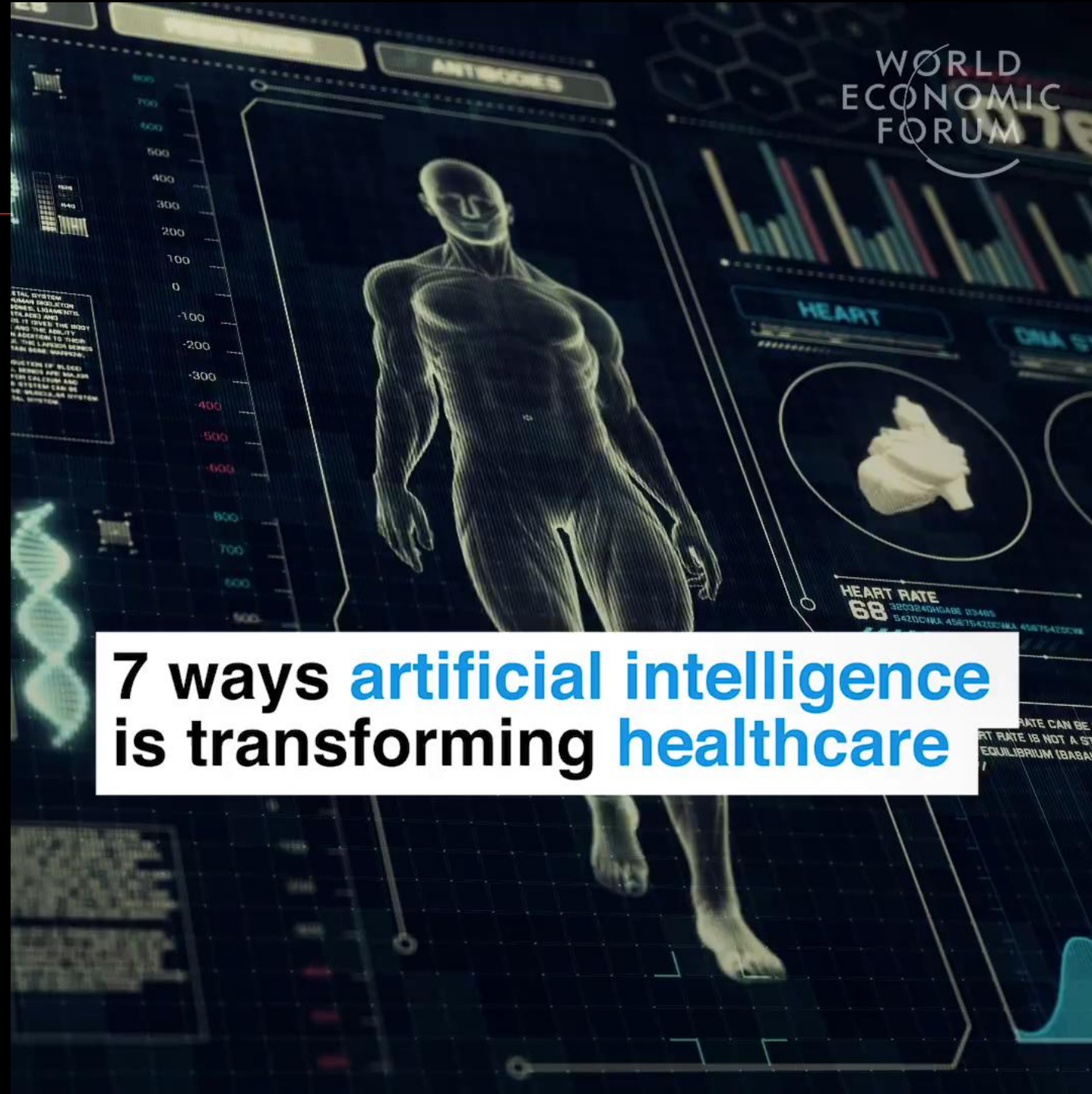
This innovative service offering has been accompanied by **positive feedback** and high interest since its inception.

MMK digital **integrates all business functions** along the value chain – from production preview to product selection and booking, all the way to call-offs from the warehouse and delivery tracking including GPS information.

A screenshot of the MMK digital website interface. At the top right, there is a blue banner with the text '24/7 SELF-SERVICE'. Below this, the main heading reads 'MMK digital buy board online!'. At the bottom, there is a table with technical specifications for 'EXCT Excellent Top GC2 Folding Boxboard'.

	215	230	250	275	300	325	350	375	400	425
g/m ²										
µm	340	350	390	450	500	550	600	650	700	750

Future ahead of us



7 ways artificial intelligence is transforming healthcare

Case for change

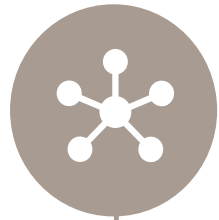
What's next?

Case for change: Amazon vs FedEx



Source: Yahoo Finance

To go digital, think in terms of practical steps



**Map out your
strategy**

1



**Create
initial pilot
projects**

2



**Define the
capabilities
you need**

3



**Master
data analytics
& other
capabilities**

4



**Scale the
change**

5

Thank you

