What really changes?
Aalto Internet Forum 2020
The future of technology and impact on Finland

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FREEDOM
IT architecture freedom...
.. increasing

Edge networks
5G
Persistent main memory
Quantum
Distributed ledgers
Machine learning specific PU
Domain gateways
Real-time simulation
Cloud to cloud compatibility
Serverless anywhere
Public cloud on-premise
Explainable AI
...

UI
Logic
Data
Platform
Compute

Human
API:s
Events
PaaS
IaaS

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Not only IT

Manufacturing
Biotechnology
Material science
Energy
Decision making is changing

- Do what you are told
- Consolidate
- Outsource
- Do X to all
- Buy products
- One time
- Build on top
- Reduce costs of X
- Work together
- Structurize
- Rightsource
- Measured
- Define patterns
- Continuous
- Build where needed
- Reduce total costs
GROWTH
Technology drives growth

For Laggards, $3 billion was forgone in 2018.

But even Middlers left nearly $2 billion on the table.

$20 billion will be lost in 2023 by Laggards.

And for Middlers, $13 billion will be at stake.

Gap = 23%

Gap = 46%
THE BUSINESS OF INNOVATION
Companies are increasing innovation adoption across their business portfolios

% of respondents who expect to apply each type of innovation to a “large extent” or “very large extent” today vs in the next 5 years

<table>
<thead>
<tr>
<th>BUSINESS MATURITY LEVEL</th>
<th>INNOVATION TYPE</th>
<th>Current</th>
<th>Next 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emerging</td>
<td>Incremental</td>
<td>19%</td>
<td>18%</td>
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<tr>
<td></td>
<td>Breakthrough</td>
<td>19%</td>
<td>18%</td>
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<td></td>
<td>Disruptive</td>
<td>18%</td>
<td>18%</td>
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<tr>
<td>Growth</td>
<td>Incremental</td>
<td>31%</td>
<td>28%</td>
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<tr>
<td></td>
<td>Breakthrough</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>Disruptive</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Legacy</td>
<td>Incremental</td>
<td>56%</td>
<td>45%</td>
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<td>Breakthrough</td>
<td>47%</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>Disruptive</td>
<td>45%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Sample N=1,090 Source: Accenture Innovation Survey 2019
High-growth companies excel in seven innovation practices

- **Hyper Relevant**: 43% High-growth, 26% Imbalanced, 31% Laggards
- **Network Powered**: 60% High-growth, 26% Imbalanced, 24% Laggards
- **Technology Propelled**: 48% High-growth, 24% Imbalanced, 28% Laggards
- **Talent Rich**: 49% High-growth, 15% Imbalanced, 23% Laggards
- **Data Driven**: 46% High-growth, 23% Imbalanced, 23% Laggards
- **Inclusive**: 59% High-growth, 36% Imbalanced, 28% Laggards
- **Asset Smart**: 58% High-growth, 28% Imbalanced, 22% Laggards

- High-growth companies (n=118)
- Imbalanced growers (n=188)
- Moderate growers (n=495)
- Laggards (n=39)
Equality and diversity drive innovation

Innovation mindset is six times higher in the most-equal cultures than in the least-equal ones.

Diversity positively influences an innovation mindset, and equality is the multiplier.

The combined effect of culture-of-equality and diversity factors on innovation mindset.
Thank You