THE ADECCO GROUP

Telecommunication in the 4th Industrial Revolution and the Skills Imperative

Alain Dehaze, Chief Executive Officer, The Adecco Group
Swiss Telecommunication Summit 2017 - *Homo digitalis – der Mensch in der digitalen Wirtschaft*

The Pervasive Innovation Challenge

THE TELECOMMUNICATIONS INDUSTRY PROVIDES THE FUNDAMENTAL BUILDING BLOCKS OF THE DIGITAL ECONOMY

World of Work: 5 Key Drivers

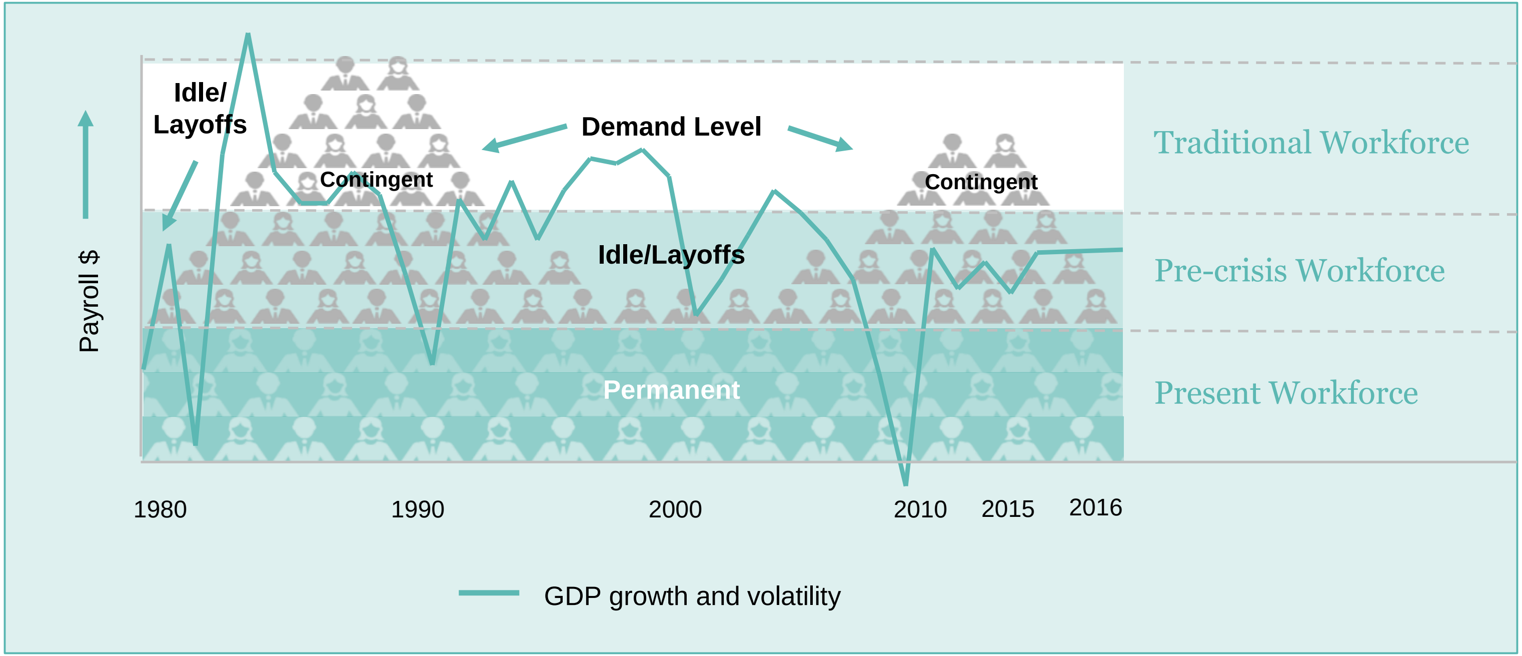
COMPLEX AND INTERCONNECTED FACTORS

Connectedness Empowers Economy

INFORMATION, NOT ASSETS OR MACHINERY, HAS BECOME BUSINESS' KEY COMMODITY

Economy is Dominated by Volatility & Uncertainty

FLEXIBILITY IS A MUST, AND A 'JOB FOR LIFE' NO LONGER EXISTS



(Source: SIA World Employment Conference, 2011/Adecco 2015) / (Source: BLS, Eurostat)

From Flexible Work, to Flexible Services Demand

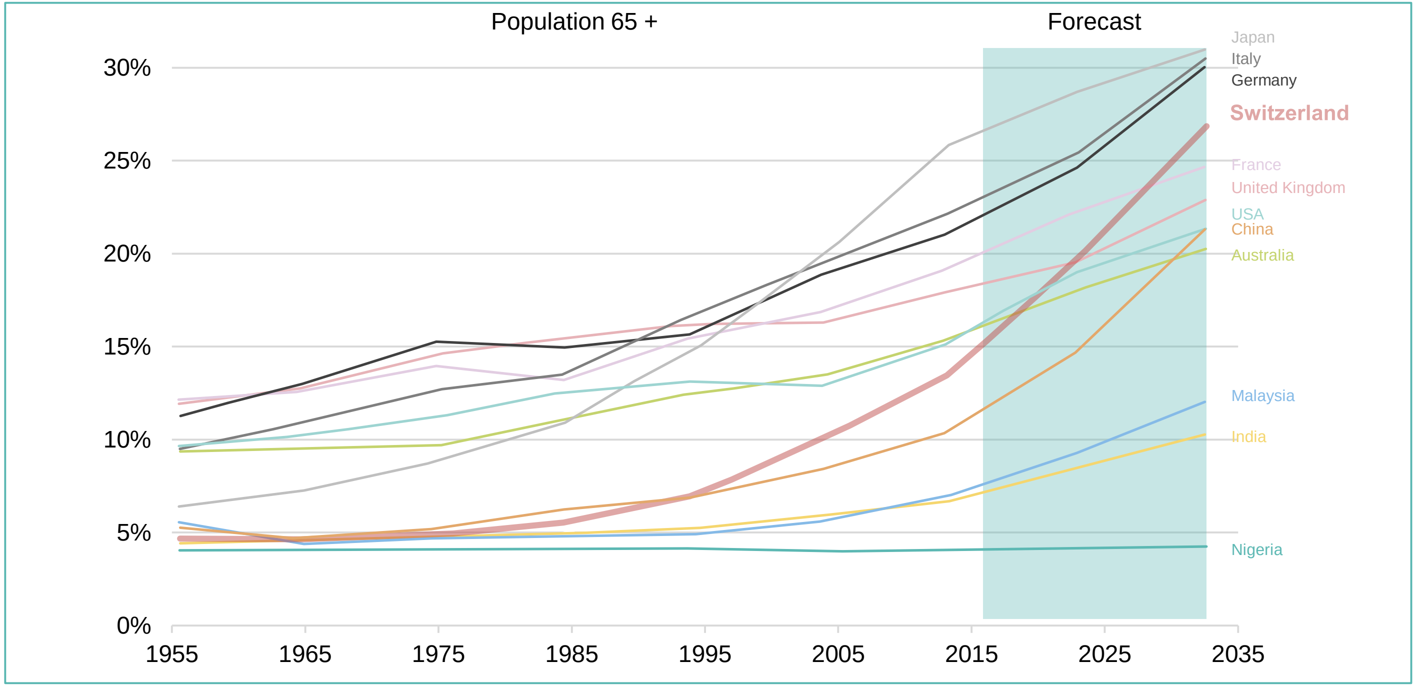
STANDARDISED SERVICE OFFERS ARE DEAD

Up to 40% of Costs Addressable Through 4.0 Services

SAVVY USE OF BIG DATA CAN CUT COST AND DRIVE EFFICIENCIES

Demography: By 2035 Younger Generations Predicted to Halve

DIVERSITY, MOBILITY AND LIFE-LONG LEARNING CAN FILL THE GAPS BUT ARE NOT SUFFICIENT



(Sources: Population Division of the Department of Economics and Social Affairs of the United Nations Secretariat, 2015 / Boston Consulting Group, The Global Workforce Crisis, $10 Trillion at Risk, 2014)

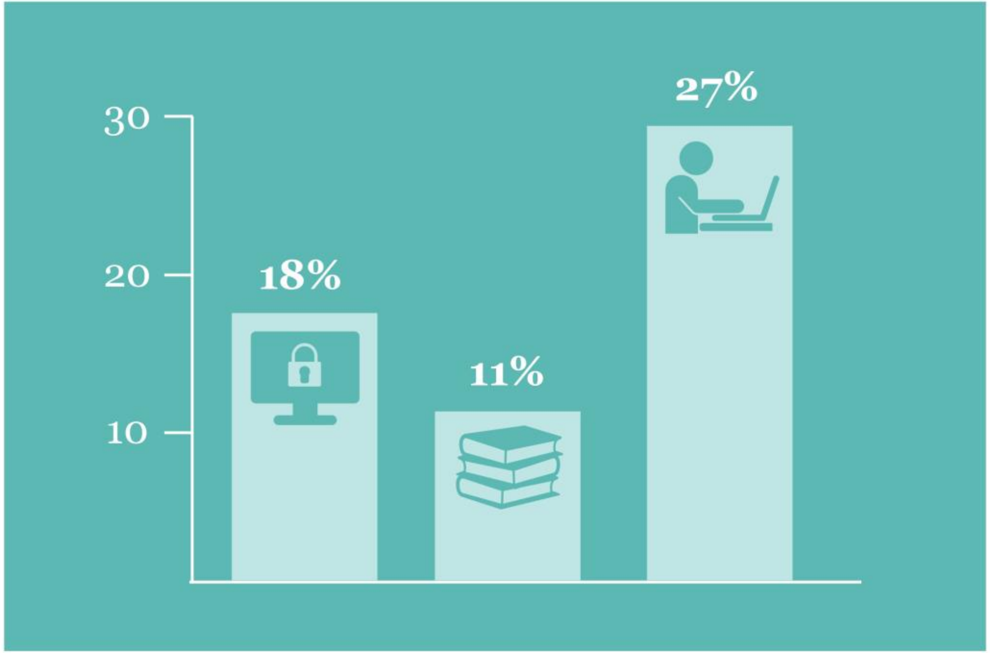
Talent for Telco

JOBS MAY CHANGE AND OTHERS DISAPPEAR BUT NEW ONES WILL BE CREATED

By 2024:

Tech jobs are estimated to **grow by 12% vs 6.5%** in all other sectors

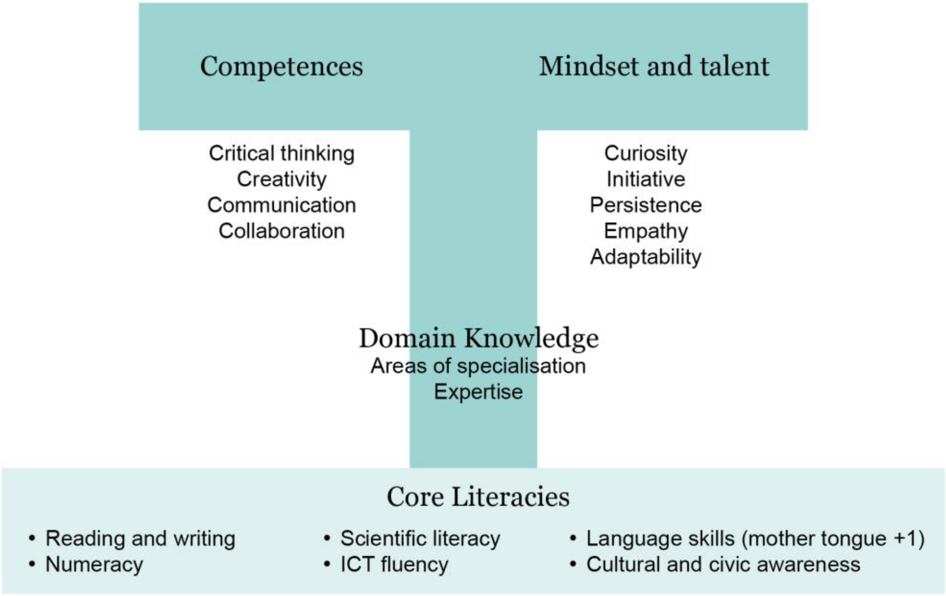
- IT security **18%**
- Database administration **11%**
- Web Development **27%**



(Sources: Modis USA, 2016)

The Soft Skills Imperative

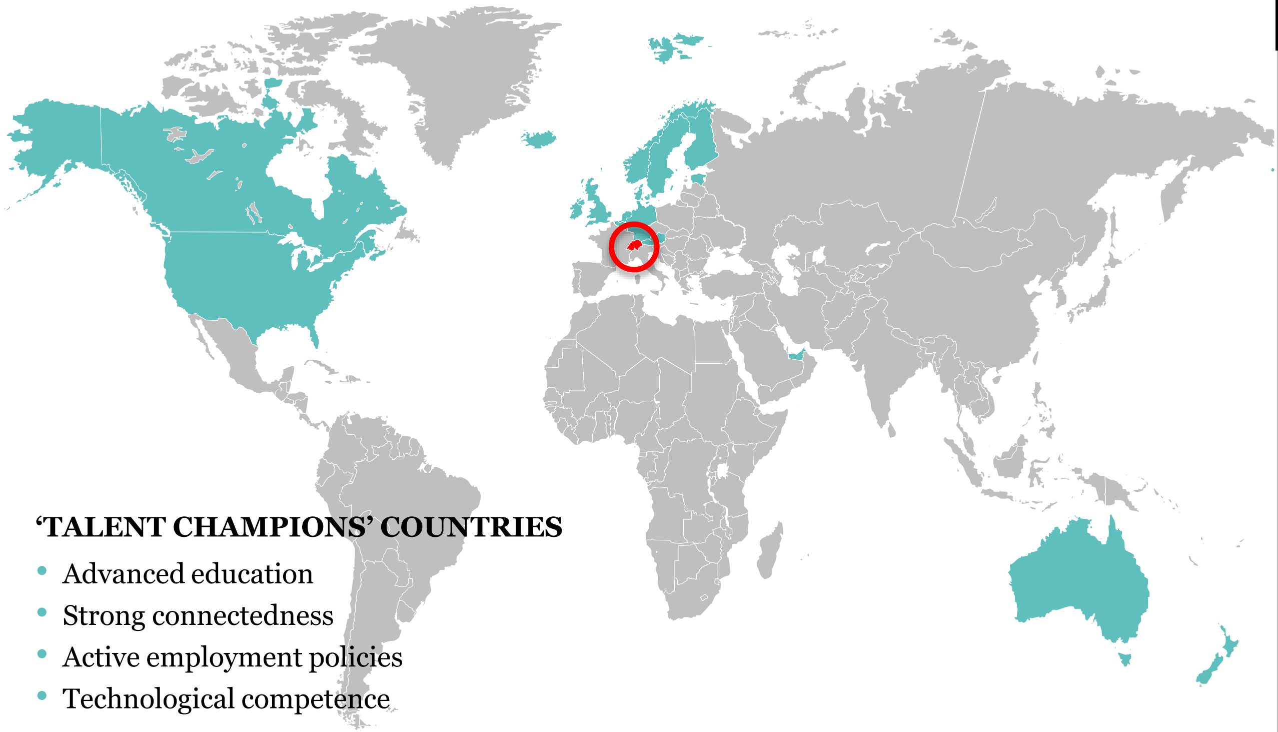
WE NEED T-SHAPED SKILLS



(Sources: Hansen, M. T. and von Oetinger, B. Introducing T-shaped managers: Knowledge management's next generation. *Harvard Business Review,* March, 2001)

Best Practices from Talent Champions

GLOBAL TALENT COMPETITIVENESS INDEX 2017



‘TALENT CHAMPIONS’ COUNTRIES

- Advanced education
- Strong connectedness
- Active employment policies
- Technological competence

TOP 20 RANKED COUNTRIES	
1. Switzerland	11. Netherlands
2. Singapore	12. Ireland
3. United Kingdom	13. Canada
4. United States	14. New Zealand
5. Sweden	15. Iceland
6. Australia	16. Belgium
7. Luxemburg	17. Germany
8. Denmark	18. Austria
9. Finland	19. United Arab Emirates
10. Norway	20. Estonia

Public-Private Partnerships to Develop Skills and Boost Prosperity

RECOMMENDATIONS

For Regulators

- Connectedness
- Invest in advanced education and digital skills
- Active employment policies

For Employers

- Invest in technology
- Foster agile and collaborative organizations
- Offer work-based training opportunities to young people

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Thank you

For any questions, ideas or thoughts

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