

STATUS QUO DIGITAL TRANSFORMATION IN SWITZERLAND 2025

**Swiss executives
report on the status
of Digital
Transformation in
companies.**

boyden



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Foreword by Patrick Naef, Managing Partner, Boyden

In my book “The Technology Illusion”, I examine one of the most prominent issues of our time: digital transformation. Throughout my career as Chief Information Officer (CIO) and as a consultant, I have repeatedly observed how much nonsense is being written and is circulating about this topic, and how often alleged “experts” mislead executives.

In my view, it is essential to distinguish between digitisation and digital transformation. Digitisation means automating existing processes within established business models; something we have been doing since the introduction of the first computers. Digital transformation, however, goes much deeper: it leads to a fundamental redesign of business models, value creation processes, products and services.

I am convinced that information technology (IT) today forms part of the strategic core of every company and is no longer a mere support function. It drives innovation and directly contributes to products, services and value creation.

Today’s networked world, as well as the younger generations who have grown up in a culture of sharing and networked patterns, think differently than the generation of my peers, who were conditioned in hierarchical structures. However, now those traditional hierarchical structures are no longer suitable for modern companies and new organisational forms are required.

To succeed in this networked world, shorter time-to-market cycles are essential. Agile methods must permeate the entire organisation, not just IT, as I have often witnessed how “agility inhibitors” in traditional siloes impede speed. At the same time, I observed a reversal of the outsourcing craze: strategic technology competencies must be rebuilt within the company, since IT is no longer a “commodity”.

The book “The Technology Illusion” is intended to provide insight for those executives who recognise the strategic value of IT and want to courageously lead their companies through the complex challenges and immense opportunities of the digital age, in order to remain relevant and competitive in the future.

Management Summary

Our study of 42 Swiss companies shows that digital transformation is a reality that manifests itself in highly diverse ways. Competitive advantage does not arise automatically, it emerges where leadership strategically combines culture, processes, and technology.

What CEOs should do now:

- **Link processes and offerings:** Digitisation alone optimises existing workflows. Digital transformation arises only when process automation is combined with the development of new digital offerings such as products, services, and business models. This enables scaling, new value creation paths and sustainable strengthening of competitiveness.
- **Invest in culture and capabilities:** Technology only unfolds its impact when employees can understand and shape it. Reskilling, upskilling and fostering a digital corporate culture therefore are central leadership tasks.
- **Frame digital transformation strategically:** A high degree of digitisation alone does not create an advantage. Digital transformation requires a clear target vision, consistent governance and robust architectures that enable long-term growth and innovation.
- **Visibly assume leadership:** Digital transformation must not be delegated. Make it a top management priority and elevate the CIO to a strategic enabler and margin driver.
- **Leverage cloud technology and Artificial Intelligence (AI) in combination:** Cloud technology creates speed and resilience; AI opens up new business logics. Focus on market-relevant applications and ensure governance for hybrid human-machine decision-making.

Core message: Digital transformation is not an IT project. It is a leadership responsibility requiring clear priorities, a CIO with a strong position within the organisation and the integration of processes, digital offerings and culture.

Digital Transformation in Swiss Companies: A Status Assessment

This study provides an assessment of the progress of digital transformation in Swiss companies. The goal is to offer decision-making support for CEOs and leadership teams who understand digital transformation not only as a technological, but also as a strategic, cultural and organisational challenge.

This quantitative survey covers 42 companies of various industries and sizes. Respondents include 28 CEOs, 10 senior management members (CXOs) and 4 CIOs (see Figure 1). Thus, the study covers the strategic overall perspective, cross-functional management view and the technological responsibility level. In addition to contextualising the quantitative findings, qualitative in-depth interviews were conducted with five CEOs and two CIOs to identify key patterns.

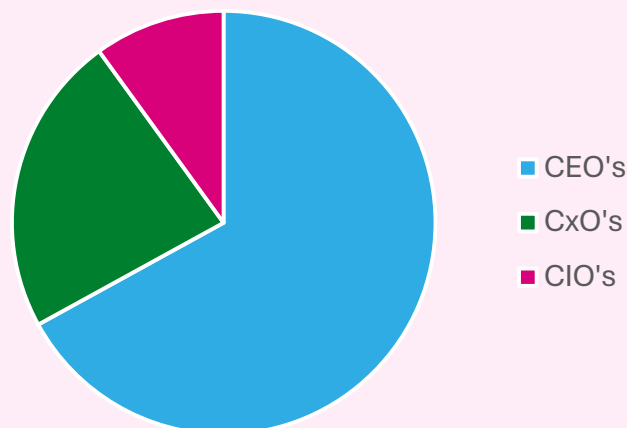


Figure 1. Composition of study participants

The report first presents the main descriptive results of the quantitative analysis to visualise the current state of digital transformation. Building on this, eight core findings on digital transformation and three on the CIO's role are derived from combining quantitative patterns with qualitative insights. These findings provide guidance on where companies stand today, which levers are most effective and how leadership can ensure the expected outcomes.

Status Quo: Digital Transformation is in Progress

The impact of digital transformation on competitiveness varies significantly. Some companies report clear advantages and strengthen market positions, while others perceive digital transformation as a burden. The range of experiences spans from setbacks to evident competitive advantages. What is decisive is that measurable benefits only appear where companies have established mature digital processes, successfully expanded their offerings digitally and anchored digital transformation strategically at the top management level.

Competitive Advantage: Digital Transformation Does Not Automatically Enhance Company Performance

On average, the surveyed companies report only a modest positive effect on competitiveness. At the same time, results differ greatly: some companies experience significant benefits, others noticeable drawbacks. This demonstrates that digital transformation is not a sure-fire success. A positive effect on perceived competitive advantage arises only where processes are consistently digitally transformed, offerings are digitally enabled, and digital transformation is institutionally anchored in corporate leadership.

Strategic Objectives: Efficiency, Innovation, and Culture as Central Reference Points

The companies surveyed primarily pursue three main objectives with their digital transformation:

- **81%** cite **efficiency** and **control** goals such as automation or cost reduction.
- **74%** address **growth** and **innovation** goals, such as new digital offerings or business models.
- **45%** refer to **culture-related** goals such as customer experience or digital corporate culture.

Thus, economic expectations clearly dominate, while cultural and organisational dimensions are less frequently considered. However, these are critical to ensuring that digital transformation is both stably anchored and simultaneously adaptable to future developments.

Impact Priorities: Business Model Innovation and Automation Dominate

The companies surveyed see the greatest impact of digital transformation in new business models and offerings, as well as in process automation. Less emphasis is placed on participation in cross-company ecosystems and on developing a digital corporate culture. Consequently, digital transformation focuses mainly on immediately visible business and process outcomes. Strategic market shifts through ecosystems and the cultural anchoring of digital capabilities remain underdeveloped: a blind spot that may limit future competitiveness and scalability.

State of Digital Transformation: Solid Foundation but No Comprehensive Transformation

The overall state of digital transformation lies at a medium level. Both the digital transformation of core business ($M \approx 2.1$) and the digitisation of processes ($M \approx 2.0$) score on a scale from 0 to 4 in the range of moderate, but not consistently high. Many companies have digitally transformed central elements of their value chains, but full-scale transformation is rather the exception so far.

Employee Empowerment: Majority of Workforce Can Work Digitally

About 60% of companies report that at least half of their employees can confidently use digital tools, including AI applications. The median of the indicator value is 1 ("half of employees"). This reflects a basic capability level. However, the distribution shows that the competency profile is not yet developed broadly enough to make more complex technologies such as agentic AI productively usable across the board.

Digital Value Creation: Initial Success with Significant Room for Improvement

The financial impact of digital transformation on the offering side has been modest so far. The median share of revenue from digital offerings is approximately 10%, and only a few companies generate more than half of their revenues from them. The share of digital offerings in the total portfolio averages just under 30%, and the degree of automation of key processes is also around 30%. These values indicate that digital transformation-driven value creation is visible but has not yet taken hold on a large scale.

Leadership Perspective: CEO in the Lead, CIO with Room for Growth

The CEO's role in digital transformation is perceived by most respondents as "strategic." CIOs, on the other hand, are often seen as meeting expectations only "more or less". This discrepancy points to an implementation gap: while in most cases CEOs claim to provide clear strategic framing, there often is a lack of structural support, operational coherence or institutional strengthening of the CIO.

The findings highlight that digital transformation is a reality in most companies, but its impact varies greatly. Technology use alone does not create efficiency or competitive advantage. Sustainable progress arises only through clear strategic framing, organisational anchoring and visible market and customer impact.

Hence, the key question is:

"Which factors determine whether digital transformation creates impact and how does leadership make the difference?"

The following chapter presents eight core findings on digital transformation that reveal the central levers of competitiveness and value creation. These are followed by three core statements regarding the role of the CIO that illustrate how the role must evolve to realise the expected results of digital transformation.

**A SUSTAINABLE
DIGITAL TRANSFORMATION
REQUIRES THE
ALIGNMENT OF PROCESSES
AND BUSINESS MODEL**





Core Finding 1: A Sustainable Digital Transformation Requires Aligning Processes and Business Model

The most effective digital transformation arises when both, process automation and digital transformation of the core business are systematically interwoven. This insight is supported by both the quantitative analysis as well as CEO and CIO interviews. Statistically, there is a correlation between process digitisation and the digital transformation of the core business. Companies that consistently connect both areas achieve substantially higher progress in their digital transformation.

In the interviews, CEOs report that digital transformation projects often fail when they focus solely on technological modernisation in isolated areas such as back-office automation, without questioning the company's value creation logic. Particularly successful initiatives, on the other hand, combine process optimisation with strategic questions: Which new digital offerings create real customer value? Which processes are required to deliver these offerings efficiently and at scale? What organisational structure ensures the anchoring and further development of both dimensions?

A CIO summarised this succinctly: "Modularisation is not only technical, but also organisational." A decentrally conceived architecture allows business units and processes to adapt quickly, autonomously and in line with market requirements.

"Those who only automate existing processes, automate the past. Impactful digital transformation arises through coupling with new offerings."

What CEOs can learn: Digital transformation must not be conducted as an additive initiative. It unfolds its impact only when it simultaneously addresses the operational backbone (processes) and the strategic target vision (new digital offerings). For CEOs, this means that digital transformation programmes must be developed along end-to-end value creation processes with a clear offering logic. A purely technical focus is insufficient.

**AUTOMATION AND
DIGITAL OFFERINGS
REINFORCE EACH
OTHER**



Core Finding 2: Automation and Digital Offerings Reinforce Each Other

Quantitative analysis shows a close relationship between the degree of automation and the share of new digital offerings in the portfolio, including products, services, and business models that are fully or predominantly based on digital technologies. This relationship remains even when looking at the general level of digitisation. Companies with a high degree of automation are significantly better at being able to deliver scalable digital offerings. Conversely, digital business models drive new requirements for automation, for example in order management, customer support or data integration.

The interviews confirm that this effect does not arise randomly, but rather that it is structurally anchored. CEOs describe the mutual reinforcement as a circular process: automation creates capacity and technical prerequisites for digital transformation, while new digital offerings in turn restructure processes and drive further automation. One company phrased it as follows: “Our digital product portfolio grows fastest where we already have automated end-to-end processes.”

For CIOs, this coupling becomes a steering principle. They specifically rely on platforms and interfaces that support both automation and innovation. Automation is not an end in itself but an enabler for market performance and time-to-market.

“Automation without digital offerings remains invisible. Digital offerings without automation remain non-scalable.”


What CEOs can learn: Automation must not be understood as a technical rationalisation program. Its strategic value only unfolds when digital transformation is specifically coupled with the development of digital offerings. CEOs should consciously address the interdependencies between operational efficiency and digital innovation capability in their transformation programmes.

DIGITAL CULTURE AND EMPLOYEE EMPOWERMENT ARE STRATEGIC GROWTH FACTORS

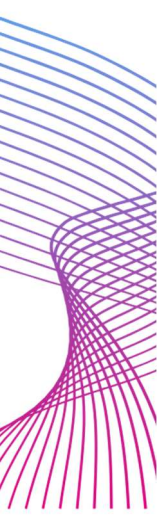




Core Finding 3: Digital Culture and Employee Empowerment Are Strategic Growth Factors



Digital transformation will remain superficial if it focuses on technical systems without taking the workforce along. The quantitative analysis shows that in companies with a strong digital corporate culture, employees' ability to use digital tools professionally is significantly higher. This relationship highlights the central role of cultural work and capability development as foundational prerequisites for scaling digital transformation.



The interviews reveal that digital transformation is only effective when employees can not only operate but also shape. A CIO put it succinctly: "We no longer need employees who just execute systems. We need those who think with systems." Particular emphasis is placed on the necessity to promote systemic thinking, adaptability, and curiosity, especially in middle management, which is frequently described as a point of resistance.

A CEO sums up the connection between digital culture and market success as follows: "We do not invest in tools. We invest in people who can use tools intelligently." This statement is supported by the quantitative findings that show that about half of the employees are proficient in using digital tools. This indicates a basic level of competence but also considerable potential for development.

"Growth does not arise through tools but through people who use tools wisely."

What CEOs can learn: Cultural and capability development are not secondary conditions, but structural success factors. The organisation's ability to use tools and new technologies productively determines whether strategic potentials are realised. CEOs should therefore actively invest in re- and upskilling as well as understanding the development of a digital corporate culture as a core leadership responsibility.

DIGITISATION ALONE CREATES ONLY LIMITED COMPETITIVE ADVANTAGE



Core Finding 4: Digitisation Alone Creates Only Limited Competitive Advantage

The analysis shows that a high degree of digitisation does not automatically mean a competitive advantage. Companies with comparable technological capabilities report widely varying competitive positions. Some were able to create new differentiation features through digital technologies, while others report increased complexity and limited benefits. Digitisation is therefore not an independent driver of competitiveness but rather an amplifier: it makes strengths more visible but can equally reinforce weaknesses.

This diagnosis is supported by CEO statements. It is repeatedly emphasised that merely introducing new tools or processes does not generate competitiveness in the market. Digital transformation only arises when technologies are combined with a clear strategy, a compelling value logic and organisational coherence. In one case, it became clear that fragmented AI projects without an architectural foundation generated neither efficiency gains nor customer benefits, despite substantial investments.

“Technology only amplifies what is strategically designed. Strengths as well as weaknesses.”

What CEOs can learn: Digital transformation must be strategically framed and aligned with the company’s market logic. Technology deployment without a target vision, governance and monetisation strategy risks missing its impact or tying up resources. CEOs should therefore ensure that digital transformation is not pursued as an end in itself, but that it is consistently aimed at strengthening the company’s market position and value creation logic.

LEADERSHIP SHAPES THE PATH OF DIGITAL TRANSFORMATION



Core Finding 5: Leadership Shapes the Path of Digital Transformation

The degree of digital transformation is closely linked to the role of the CEO. Quantitative analysis shows a moderate correlation between the CEO's strategic engagement and the progress of digital transformation. Where the CEO actively assumes responsibility, the level of digital transformation is systematically higher. However, as this finding is based on self-reported information, it can therefore also reflect how CEOs perceive and present their own role. Nonetheless, the patterns highlight that top-level leadership is a decisive factor in the success of digital transformation.

This finding is confirmed by the interviews. Successful digital transformations are almost always CEO-driven and not delegated. Digital transformation is described as a permanent leadership responsibility, not as a project. CEOs act as strategic orchestrators or pacemakers, create commitment within the leadership team and shape digital transformation programmes with a long-term perspective.

At the same time, it becomes clear that leadership also plays a role in selecting the right people: several CEOs emphasise that digital transformation succeeds not only through programmes but also through the appointment of the right people, particularly in top and middle management.

“Digital transformation gains strength when the CEO makes it a top priority: visible and binding.”

What CEOs can learn: Digital transformation is not an IT project, but a top-level leadership task. The CEO must assume visible responsibility, structurally anchored, and culturally credible. Digital transformation succeeds when CEOs see themselves as active shapers of technological, cultural and organisational change.



**VISIBLE
DIGITAL
CUSTOMER INTERFACES
GENERATE
INTERNAL MOMENTUM**

Core Finding 6: Visible Digital Customer Interfaces Generate Internal Momentum

A surprisingly clear relationship emerges between externally visible digital offerings and internal adoption dynamics. Companies that invest in digital offerings and ecosystem participation report significantly higher use of digital tools by their employees. The mere digitisation of internal processes, by contrast, has hardly any effect on tool adoption.

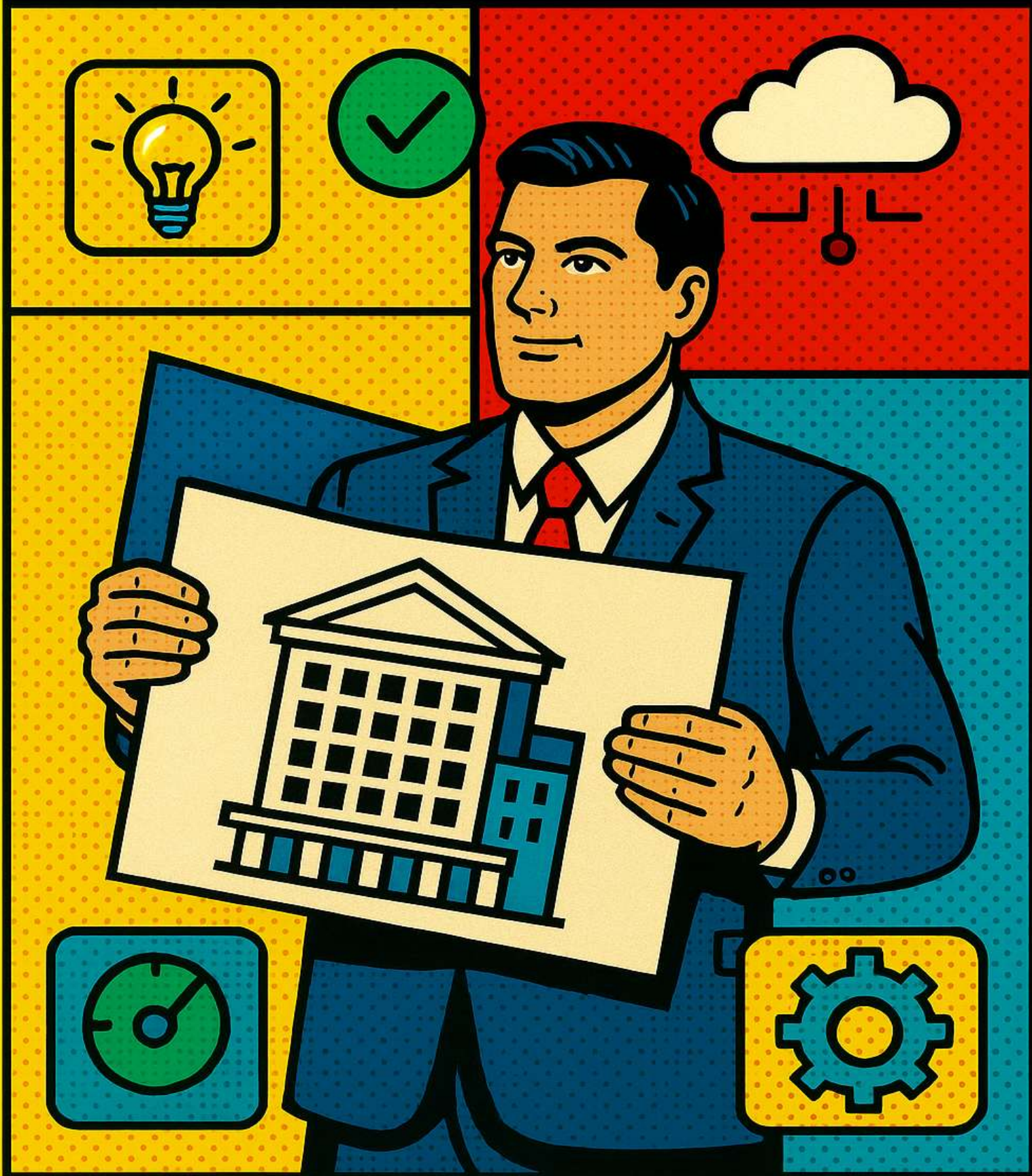
In interviews, several CEOs explicitly describe this relationship: the introduction of digital offerings created a pull effect across other areas, from HR to production. Internal acceptance, motivation, and a shared understanding of digital transformation only emerge through concrete, visible applications.

CIOs also observe that back-office digitisation is often perceived as abstract or intangible, whereas customer interfaces make the concrete added value of digital transformation visible.

“When the customer experiences the benefit, the organisation will follow.”

What CEOs can learn: Visible digital offerings at the customer interface act as catalysts for anchoring digital transformation within the organisation. They generate not only external value but also internal alignment. CEOs should therefore invest in lighthouse projects that create customer value and thereby accelerate cultural and organisational digital transformation.

**DIGITAL TRANSFORMATION
BEGINS WITH ARCHITECTURE,
NOT WITH ISOLATED INITIATIVES!**





Core Finding 7: Digital Transformation Begins with Architecture, Not with Isolated Initiatives

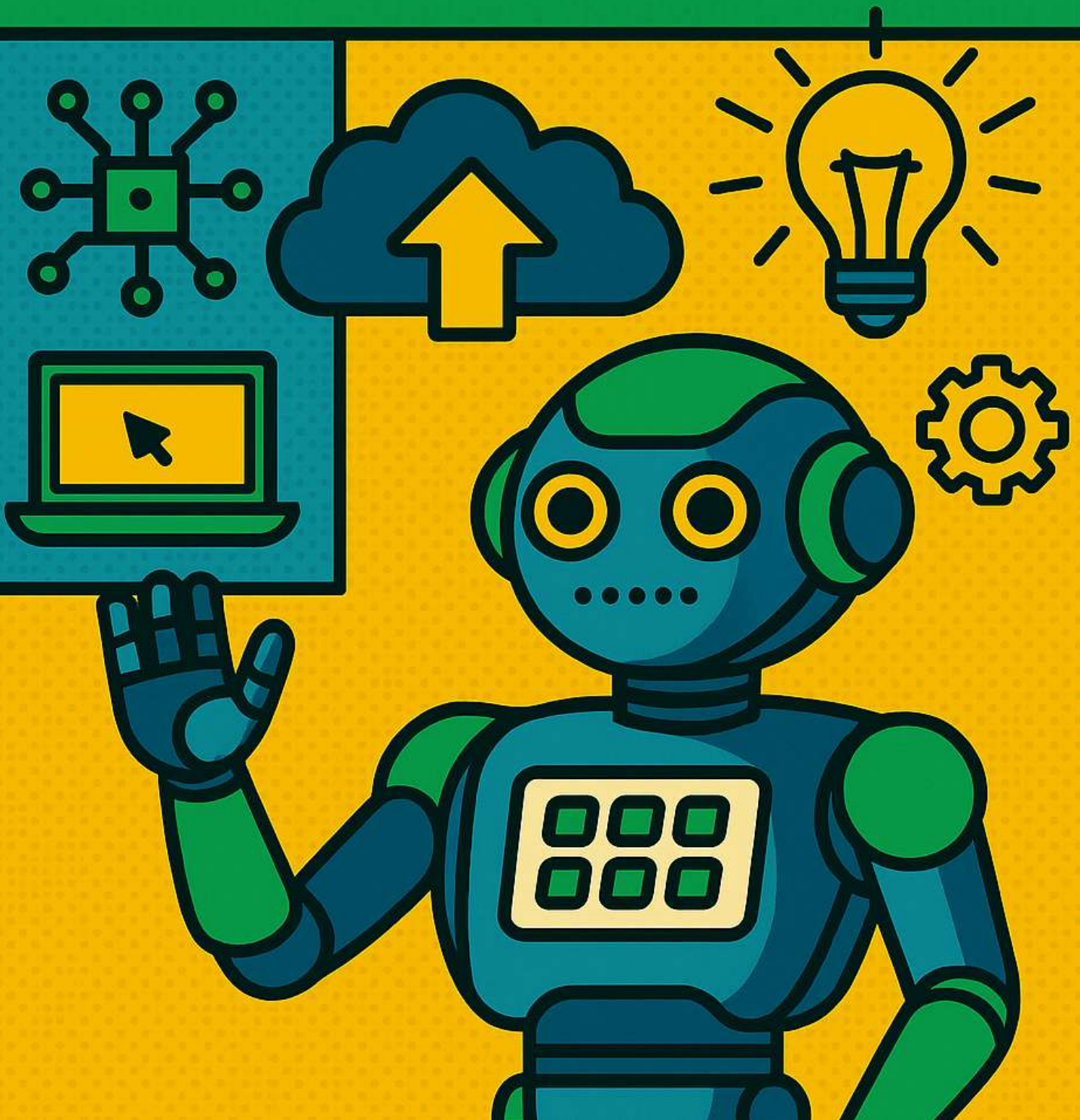
Both qualitative and quantitative results emphasise that the scalability of digital offerings and the effectiveness of technologies such as AI depend strongly on technological and organisational foundations. Automation, data availability, and modular business architectures are not secondary considerations but structural prerequisites for digital transformation. The quantitative data also show that growth objectives correlate with higher monetisation of digital offerings. However, when the goal is to expand the portfolio, cultural objectives in particular seem to have a greater effect on the development of new offerings.

Both aspects must be considered together. CIOs report that fragmented use-case logics (e.g., individual GenAI pilots) without a unified platform strategy rarely unfold impact. Instead, it requires architectures that systematically enable interoperability, governance and further development. Such architectures includes both technological components (interfaces, data models, platform services, etc.) and organisational principles (distributed responsibility, modular teams and “embedded IT”). CEOs who successfully achieve structural transformation do not think in terms of individual measures, but rather in systems.

“Growth objectives drive monetisation; cultural objectives drive offerings. The combination creates sustainable digital transformation.”

What CEOs can learn: Sustainable digital transformation begins with foundational architectural decisions, not with the launch of showcase projects. Without robust platforms, many initiatives remain isolated and non-scalable. CEOs should understand architectures as a strategic investment rather than leaving them to IT alone.

ARTIFICIAL INTELLIGENCE AND CLOUD TECHNOLOGY ARE BECOMING DOMINANT DRIVERS OF DIGITAL TRANSFORMATION



Core Finding 8: Artificial Intelligence and Cloud Technology Are Becoming Dominant Drivers of Digital Transformation

The data show that over two-thirds of companies pursue growth and innovation goals, and this group reports significantly higher competitiveness. Automation and digital offerings reinforce each other, highlighting the structural role of new technologies for scaling. In this context, AI and cloud technology are not simply add-ons but the logical next stage of digital transformation. Cloud does not necessarily mean the use of hyperscaler infrastructures, but also includes private and hybrid models. Similarly, AI is not limited to generative language models but spans from machine learning to agentic systems.

The interviews reveal that cloud technology provides the foundation for speed, scalability and resilience, while AI translates data into new offerings and decision logics. CIOs emphasise that agentic AI becomes truly effective only when interfaces and governance frameworks provide the “arms and legs” of systems. Without cloud technology, AI remains fragmented; without AI, the cloud remains limited to efficiency gains.

With the emergence of agentic AI systems, the logic of leadership also changes. Decisions increasingly arise within hybrid human-machine systems, the outcomes of which CEOs and leadership teams must critically assess. Responsibility remains with humans, even when AI agents act autonomously. This requires new competencies in management: assessing results under uncertainty, establishing governance for algorithmic actions and integrating technological autonomy with human accountability.

“Cloud technology without AI remains infrastructure; AI without cloud technology remains an isolated solution. Impact arises through their interaction.”

What CEOs can learn: Digital transformation requires the targeted connection of cloud technology and AI. CEOs should understand cloud as a platform for data, security, and scalability and deploy AI where it redefines value creation and business logic. Investments should focus on customer interfaces and market-relevant applications rather than isolated use cases.

CIOs ARE STRATEGIC ENABLERS, NOT MERELY TECHNICAL SERVICE PROVIDERS



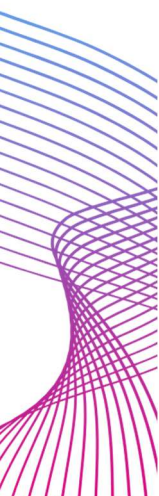


Three Findings on the Role of the CIO in Digital Transformation



First Finding: CIOs Are Strategic Enablers, Not Merely Technical Service Providers

Interviews with CEOs and CIOs show that the traditional, technology-centric administrative role of the CIO has become obsolete. What is needed are CIOs who combine technological expertise with strategic competency. CIOs must be able to translate technological developments into business-relevant target visions, take responsibility for architectural decisions, and orchestrate digital transformation across the organisation.



A CEO captured this shift clearly: “We no longer need a CIO who only ensures secure IT operations. We need someone who rethinks the company with me.” In another case, a change in CIO led to a complete redefinition of IT’s status: from a peripheral function to a strategic actor within the leadership team.


The quantitative survey underscores the strategic importance of this role but also reveals potential for development: while CEOs consistently describe themselves as strategic drivers of digital transformation, CIOs are often perceived as meeting expectations only “more or less”. This indicates a structural gap between expectations and the actual design of the CIO role.

“The CIO: from cost factor to margin driver.”

What CEOs can learn: The CIO is no longer an extended arm of IT, but an equal strategic partner within the leadership team. CEOs should elevate the CIO role, integrate it into strategic work and assess its performance in terms of business impact rather than just technical excellence.

Second Finding: CIOs Shape Leadership and Culture, not just Technology

CIOs increasingly see themselves as leaders responsible for cultural change. In the interviews, their role is explicitly described as a leadership task rather than a technical expert domain. Digital transformation, according to the tenor, succeeds not through systems but through relationships, translation ability and leadership strength. CIOs must tolerate uncertainty, navigate conflicting goals and credibly embody change.



Especially in the context of agentic AI systems, this cultural dimension gains importance. Despite growing technological autonomy, responsibility for decisions and their consequences typically remains with humans, usually with the CIO or their team. This requires new forms of governance, a deep understanding of system implications and the ability to assume responsibility where technology reaches its limits.

“CIOs do not just implement systems, they shape ways of working and mindsets.”

What CEOs can learn: The CIO is not only a technical enabler but also a cultural integrator. Appointing the right CIO is a key leadership decision with strong symbolic significance. CEOs should deliberately promote individuals who can act not only technically, but also interpersonally, communicatively, and culturally.

Third Finding: CIOs Become Platforms for Organisation-Wide Innovation

CIOs no longer operate as functional managers, but as a company-wide platform for innovation, integration, and growth. In practice, this means that CIOs assume responsibility well beyond IT: they manage strategic technology portfolios, set architectural guardrails, and drive cross-functional transformation in areas such as logistics, finance, HR, or product development.

A CIO described this role as being a “challenger of the business,” tasked with shifting mental frameworks, introducing external reference points, and breaking down internal siloes. This requires strong integration into the executive team, a broad mandate, and structured connections across all business units. In one case, the CIO role included 14 direct reports spanning multiple business units, a sign of its horizontal reach and strategic importance of this role.

“Without a CIO in the executive team, digital transformation remains fragmented.”

What CEOs can learn: The CIO role is the bracket for organisation-wide digital transformation. It requires clear mandates, resources and structural anchoring beyond traditional IT boundaries. CEOs should understand the CIO not only as a functional manager, but as the architect of a networked and innovative organisation.

Summary

The study reveals three patterns with immediate relevance for corporate leadership. First, process digitisation and automation only unfold their full impact when tightly integrated with digital offerings and end-to-end processes, i.e., when viewed as part of a holistic digital transformation. Second, many companies focus too strongly on efficiency and growth while neglecting cultural and organisational aspects, even though precisely these determine the sustainability and success of digital transformation. Third, the CIO role remains underdeveloped: while the CEO clearly assumes strategic responsibility for digital transformation, the role of the CIO as an active co-creator is needed to ensure implementation and scaling.

The central message is clear: digital transformation is not a sure-fire success. Competitive advantage only arises where leadership takes explicit responsibility for change, and where operational and strategic priorities are consistently aligned, while also ensuring that culture and organisation provide the necessary alignment and connectivity. For CEOs, this means understanding digital transformation as a leadership responsibility, anchored in clear priorities, binding structures and an institutionally strengthened role for the CIO.

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In preparing this report, particularly the visuals and the Management Summary, we used ChatGPT 5.0, thereby leveraging the innovative potential of generative artificial intelligence while avoiding lengthy and costly negotiations over image or graphic copyrights

