



PRESENTAZIONE DI MARIE-LAURE DJELIC

Italia, Francia ed Europa nel mondo digitale

30 maggio 2018

LUISS – Villa Blanc



L'IMPACT DE LA DIGITALISATION SUR LES ECONOMIES FRANCAISE ET ITALIENNE DANS UN CONTEXTE DE GLOBALISATION



**... QUELQUES REFLEXIONS
SANS PRETENTIONS....**

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Diffusion Sociale de Pratiques Digitales (Culture Digitale)

Transformation Structurelle de la Chaîne de Valeur

Grande entreprise, SA, managerialisée, logique d'oligopole

DIGITALISATION

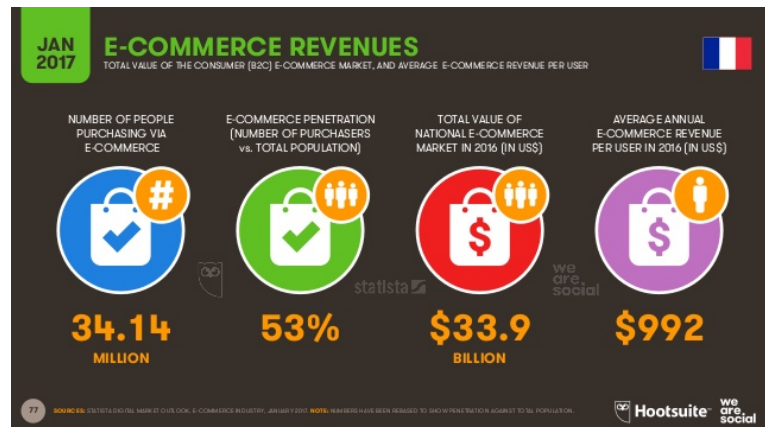
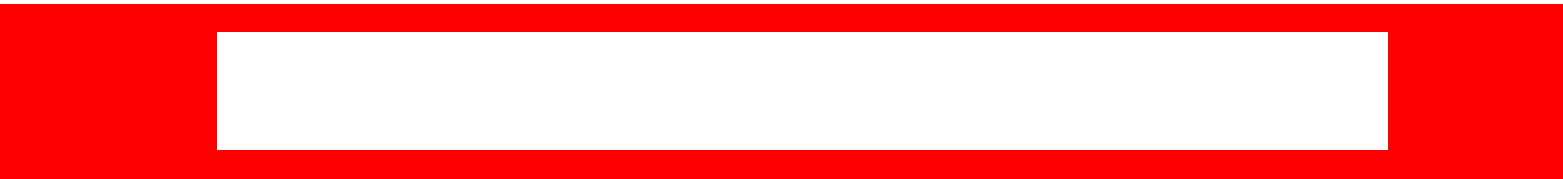
Emergence d'une économie digitale

Economie Française vs Italienne

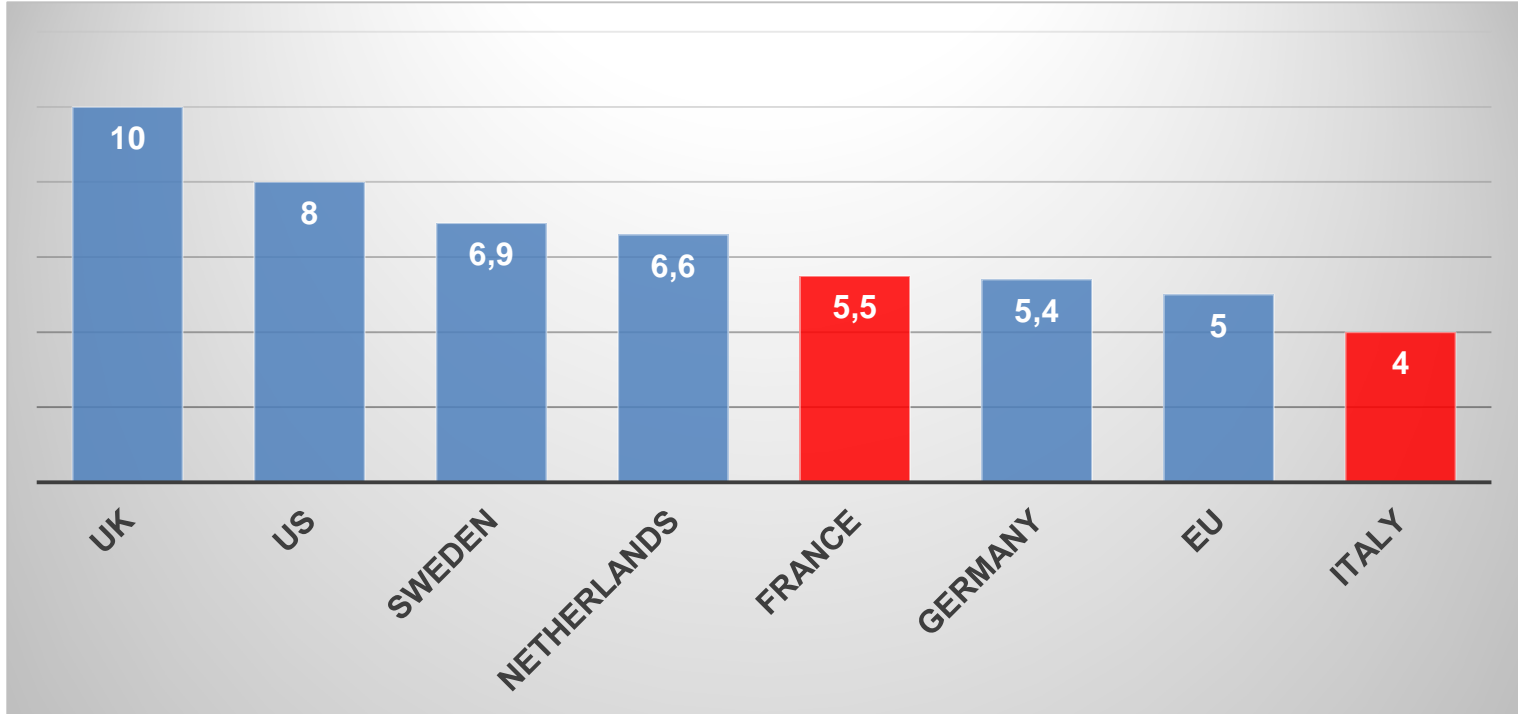
PME, familiales, réseaux denses régionaux, co-opétition,

Globalisation

	Encensée	Contestée
Linéaire		
Cycle		



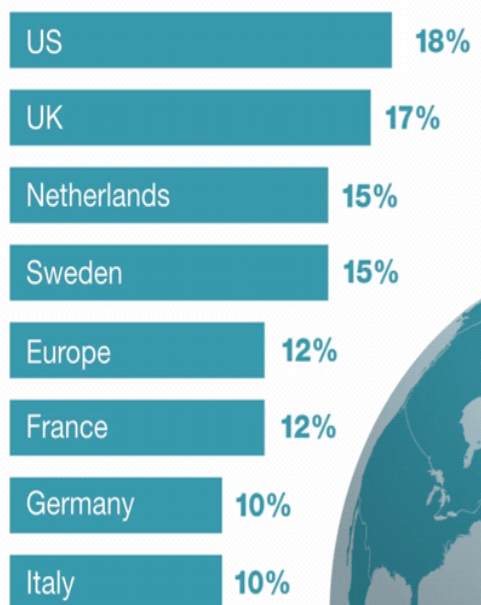
DIGITAL SHARE OF THE ECONOMY % OF GDP 2016 OECD Eurostat & McKinsey Global Institute



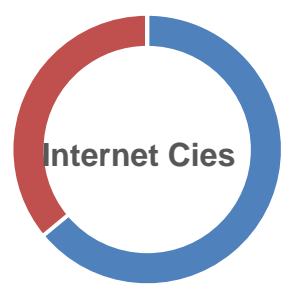


MARKET CAPITALIZATION TOP 20 CIES (2015 %)

Captured digitization potential



Europe and the **United States** have captured only a small percentage of the potential from digitization.

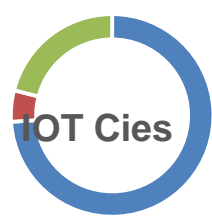


■ US ■ Asie ■ Europe



■ US ■ Asie ■ Europe

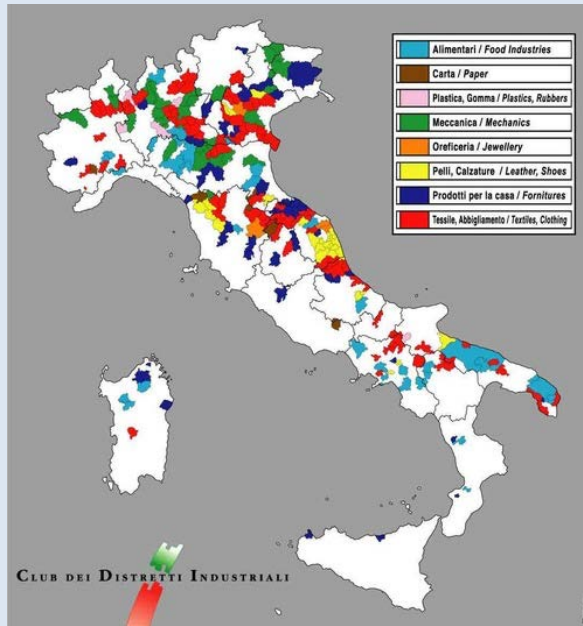
REVENUE TOP 20 Cies (2015 %)



■ US ■ Asie ■ Europe



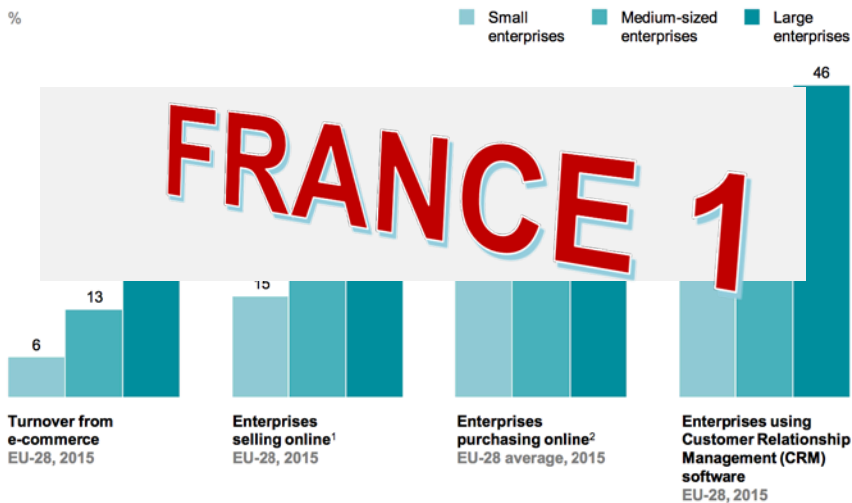
■ US ■ Asie ■ Europe



ITALY vs FRANCE DES CHEMINS DIFFERENTS ?

Exhibit 12

Within Europe, small and medium-sized enterprises lag behind large firms in digital adoption



“Italy is going through a very important and radical transformation from a traditional manufacturing to a modern digital manufacturing. Modern manufacturing is a competitive advantage for Italian companies. They are nimble and flexible and very fast to adopt new technologies.” *Michele Scannavini, Italian Trade Agency*

<https://www.technologyreview.com/s/603856/italy-transforms-itself-into-a-high-tech-hotbed/>



The Entrepreneurial State – Guiding and Framing Digitilization for the Common Good: “The state has historically served not as a meddler in the private sector but as a key partner of it ... Across the entire innovation chain ... governments have stepped up with needed investment that the private sector has been too scared to provide” (Mazzucato 2015).



2016



2018

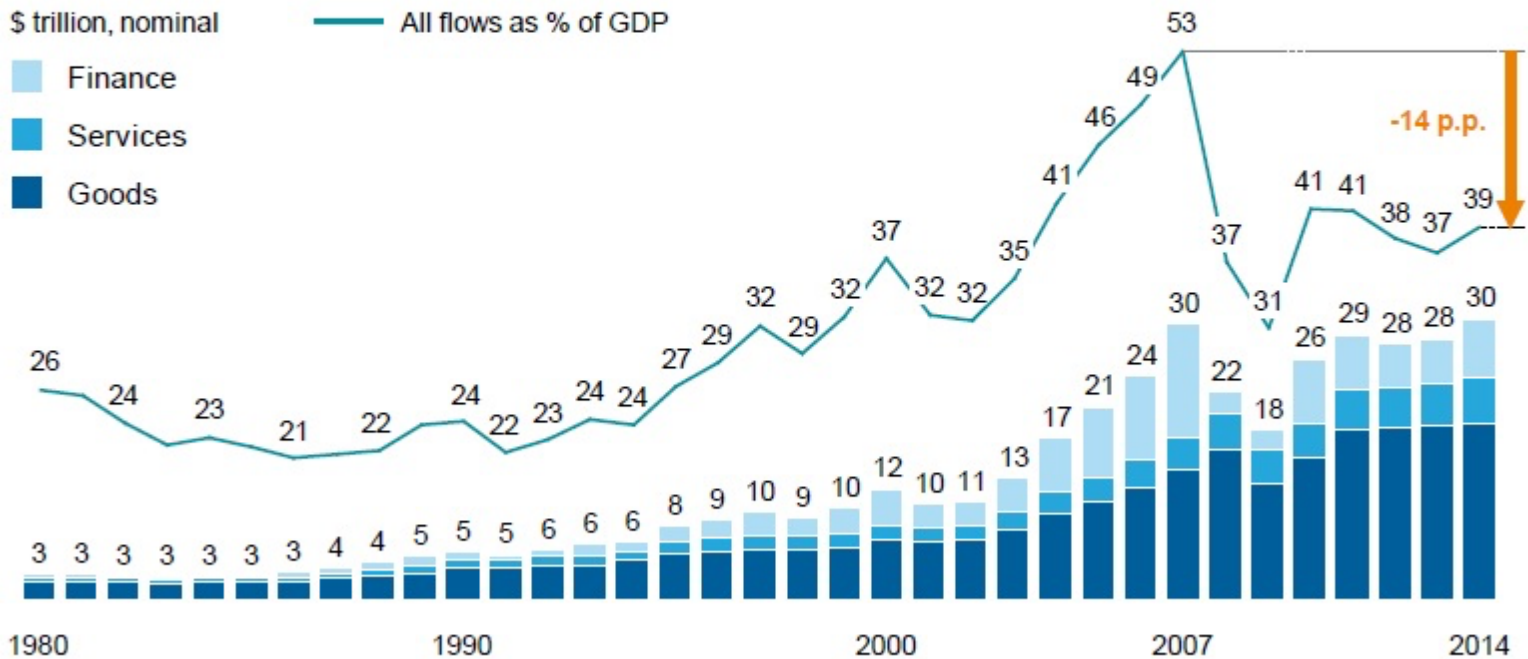


DES DEFIS COMMUNS

Exhibit E1

After 20 years of rapid growth, traditional flows of goods, services, and finance have declined relative to GDP

Flows of goods, services, and finance, 1980–2014

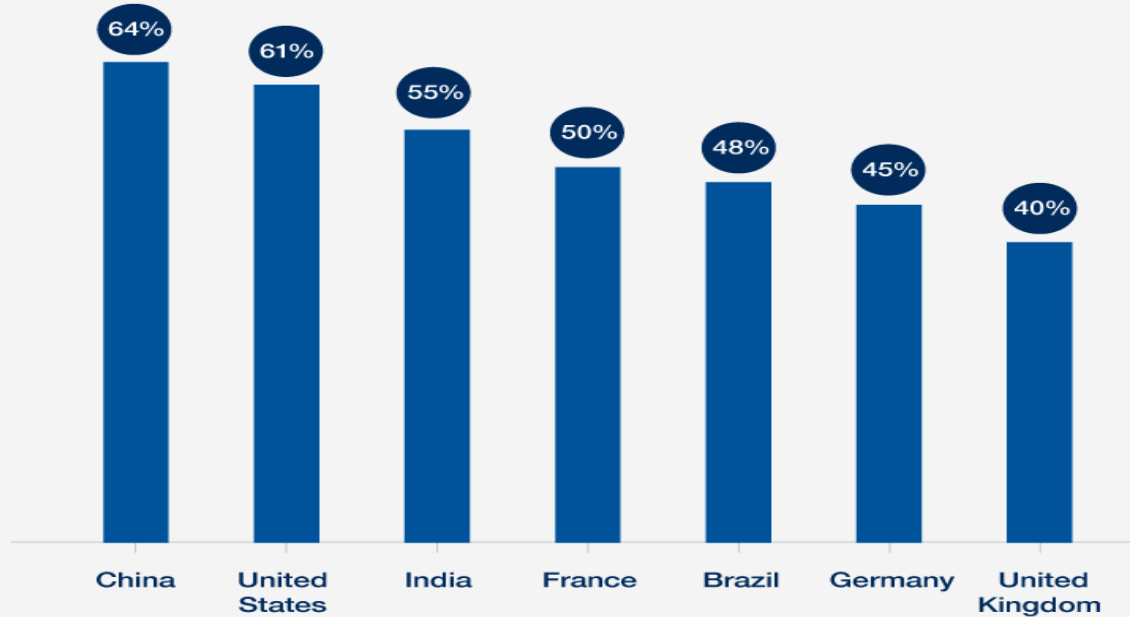


SOURCE: UNCTAD; IMF Balance of Payments; World Bank; McKinsey Global Institute analysis



To what extent do you agree or disagree with the statement:
“Businesses are not doing enough to build trust with customers (B2C and B2B) over use of their data”?

(Percentage of respondents who agree or strongly agree)



Source: Accenture Personal Data Survey, 2014



**AUTHENTICITE, CONTACT
HUMAIN, CONSOMMATION
LOCALE, RAISONNEE....**

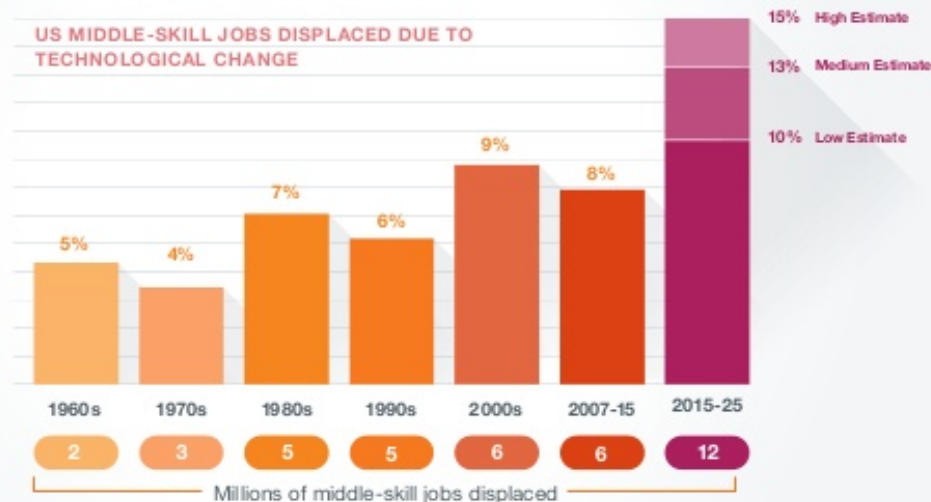
LE PARADOXE DE L'ÉCONOMIE DIGITALE

'The large majority of individuals in Europe benefit hugely from digitisation as consumers; as workers the impact is more mixed.' McKinsey Global Institute

MAIS...SANS TRAVAIL COMMENT PRODUIRE DES CONSOMMATEURS.....???

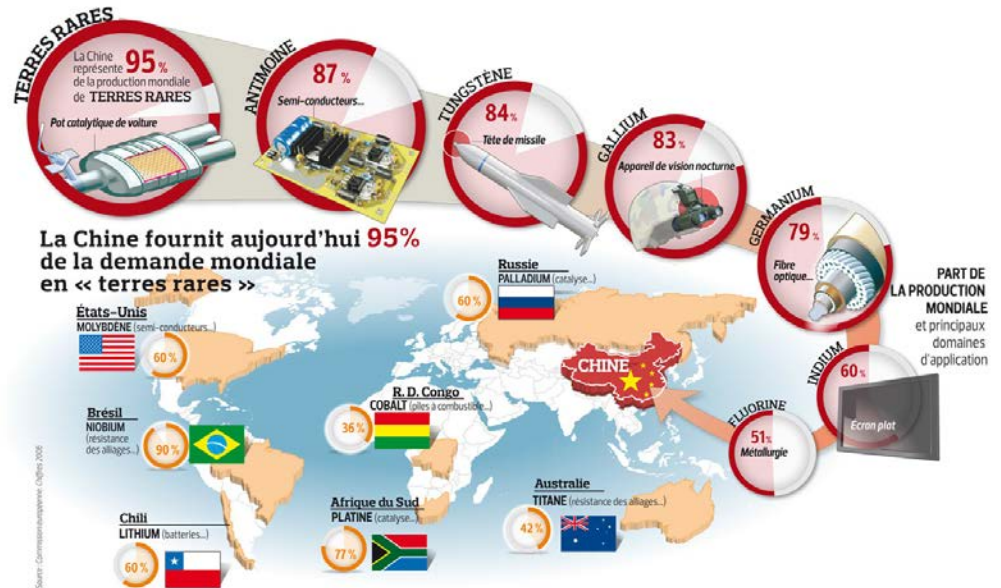
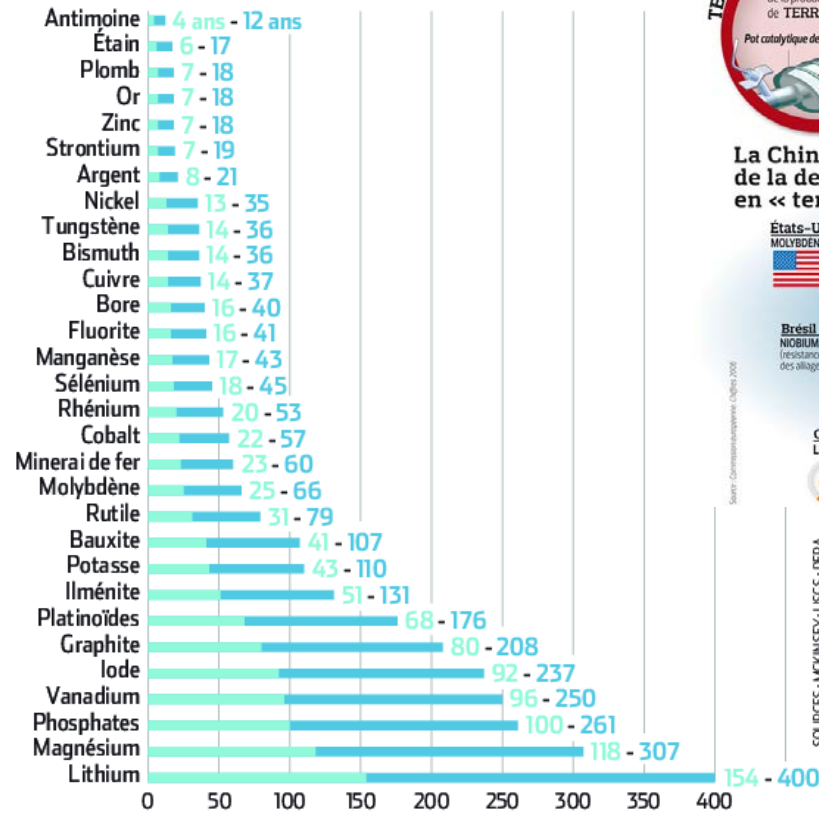
Automated tasks to nearly twice the rate of recent decades

- Up to 45% of tasks could be automated
- Up to 30% of tasks in 60% of jobs could be automated



Durée de vie des réserves rentables (en années d'exploitation)

■ En cas de boom (demande accrue de 10% pendant dix ans)
 ■ Au rythme actuel de production

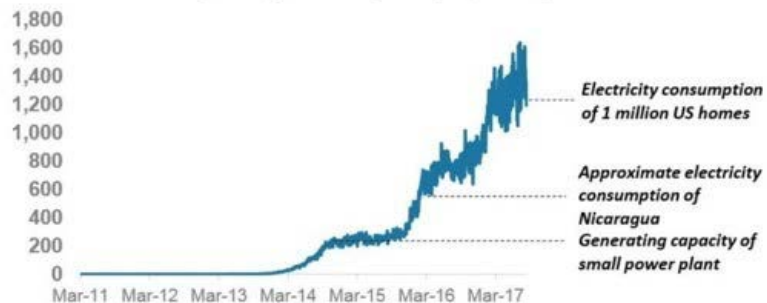


SOURCES: MCKINSEY; USGS; DERA



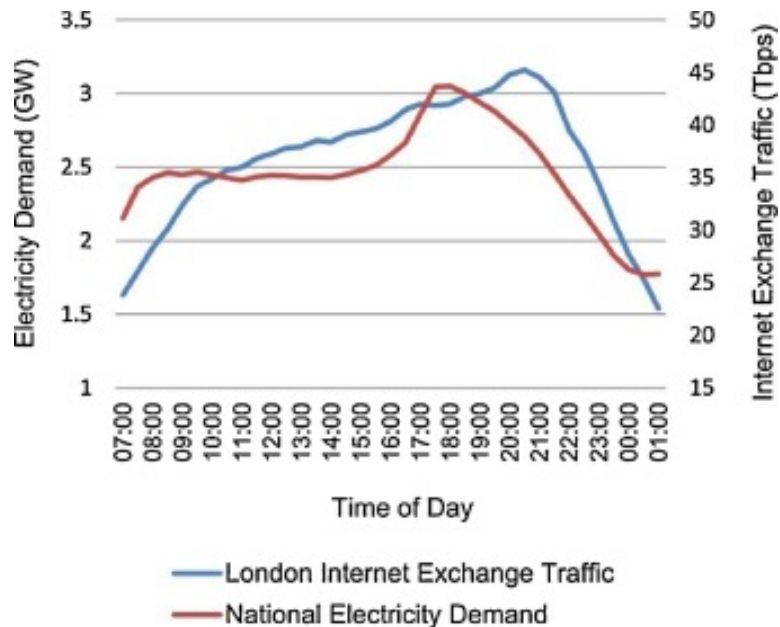
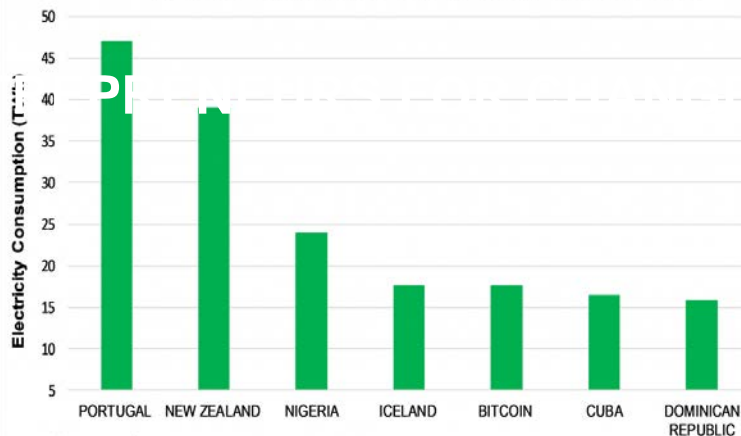
Exhibit 2: Bitcoin mining creates a scale issue, as electricity consumption becomes a serious externality to the network

Global Bitcoin Mining Energy Consumption (Megawatts)



Note: Energy consumption estimated based on global mining hash rate multiplied by average Joule/gigahash/s energy usage, which we assume declines linearly from 1.5 in 2014 to 0.2 in 2017

Electricity Consumption - Bitcoin Versus Other Countries



‘Digitalisation, Energy and Data Demand’, Morley, Widdicks, Hazas (2018). *Energy, Research & Social Science*, 38.

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