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- A leader in the Corporate Finance, Strategy, and Media & Entertainment Practices
- Established McKinsey Digital Labs in 2000
- Serves global clients in high tech, media, retail, telecom and B2B services
- Deep expertise in digital marketing, business technology, and operations performance
- Holds a Ph.D. in Economics from the Université Catholique de Louvain, and Master's Degrees from the University of Namur and University of Pennsylvania
- Author of more than 50 academic papers in top international journals, and of 50 management articles in MckQuarterlies
- Frequent speaker internationally (Aspen Institute, Forbes, INMA, NAB, CES, IAB)
- MGI lead research in big data, internet, etc





Digital globalization: The new era of global flows

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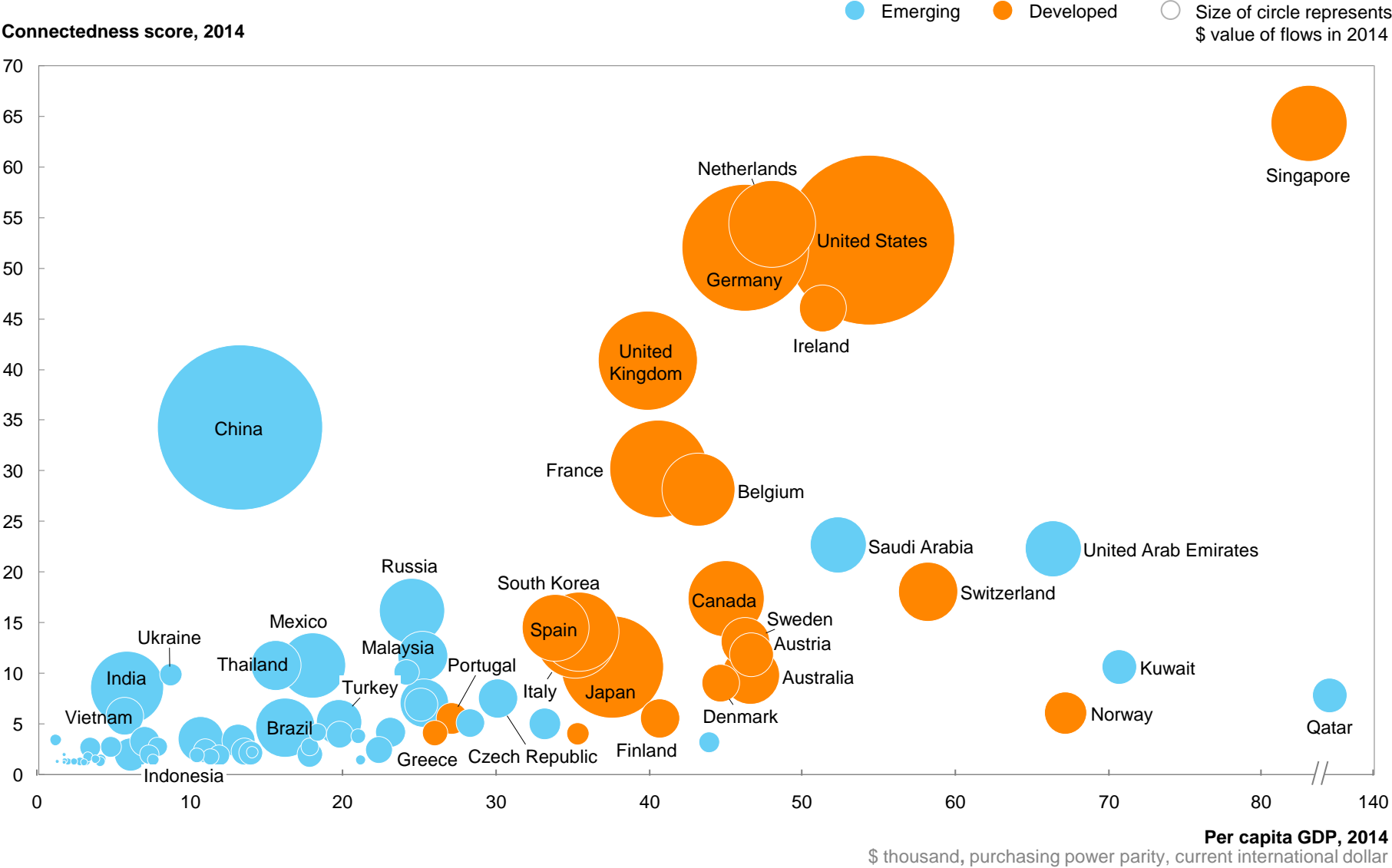
UNCTAD

April 19th, 2016

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An increasingly, but still not fully, connected world



SOURCE: IMF; McKinsey Global Institute analysis

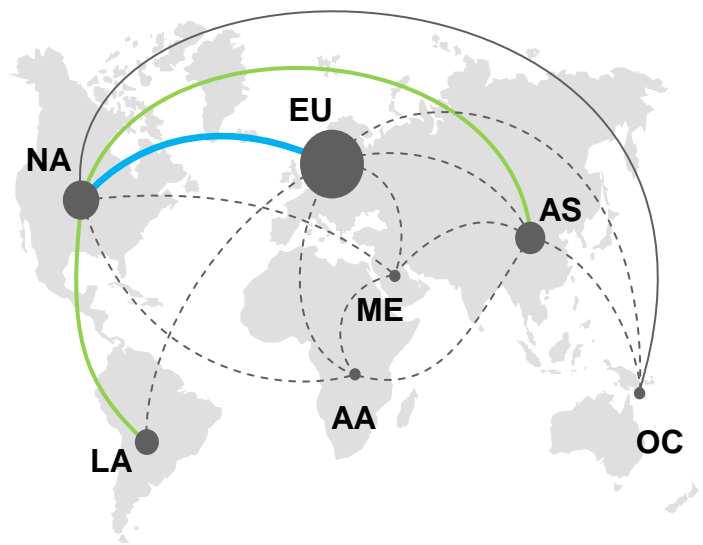
Data is the new major flow

Bandwidth

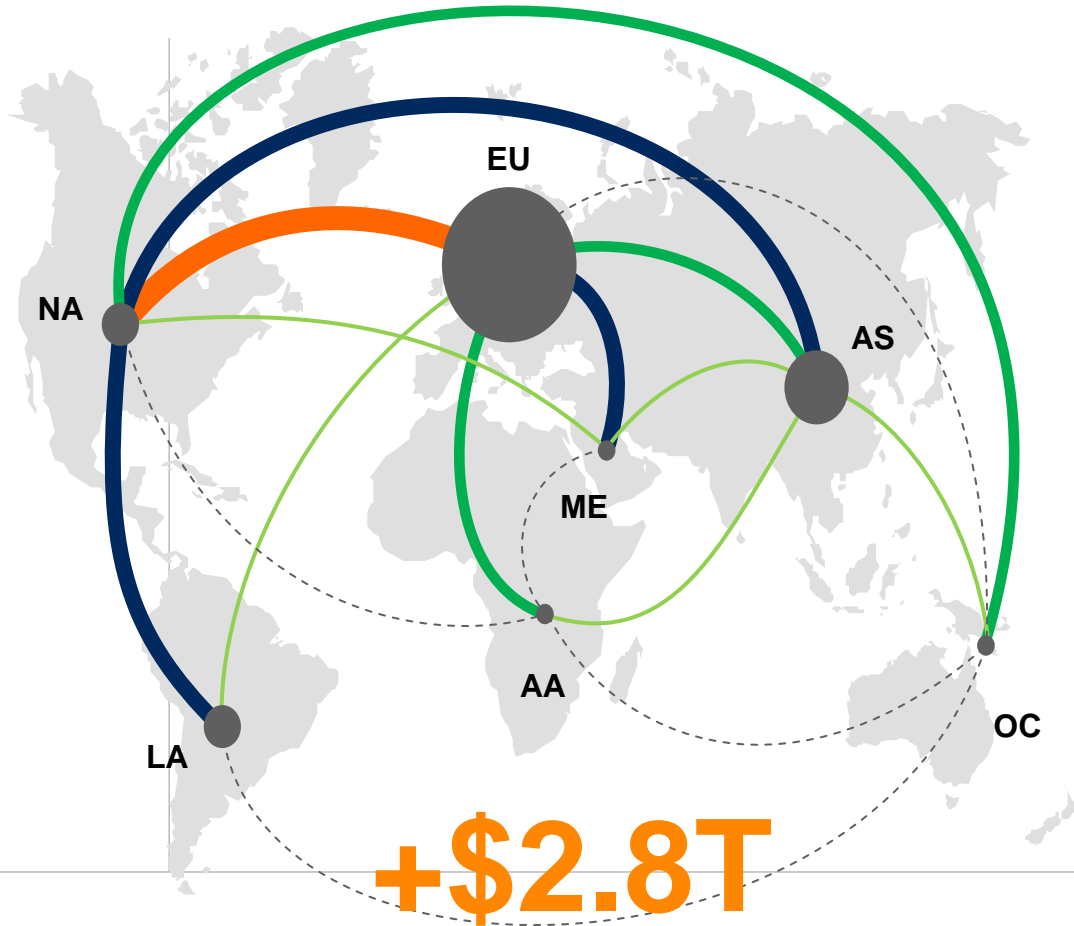
Gigabits per second (Gbps)



2005¹
 100% = 4.7 Terabits per second (Tbps)



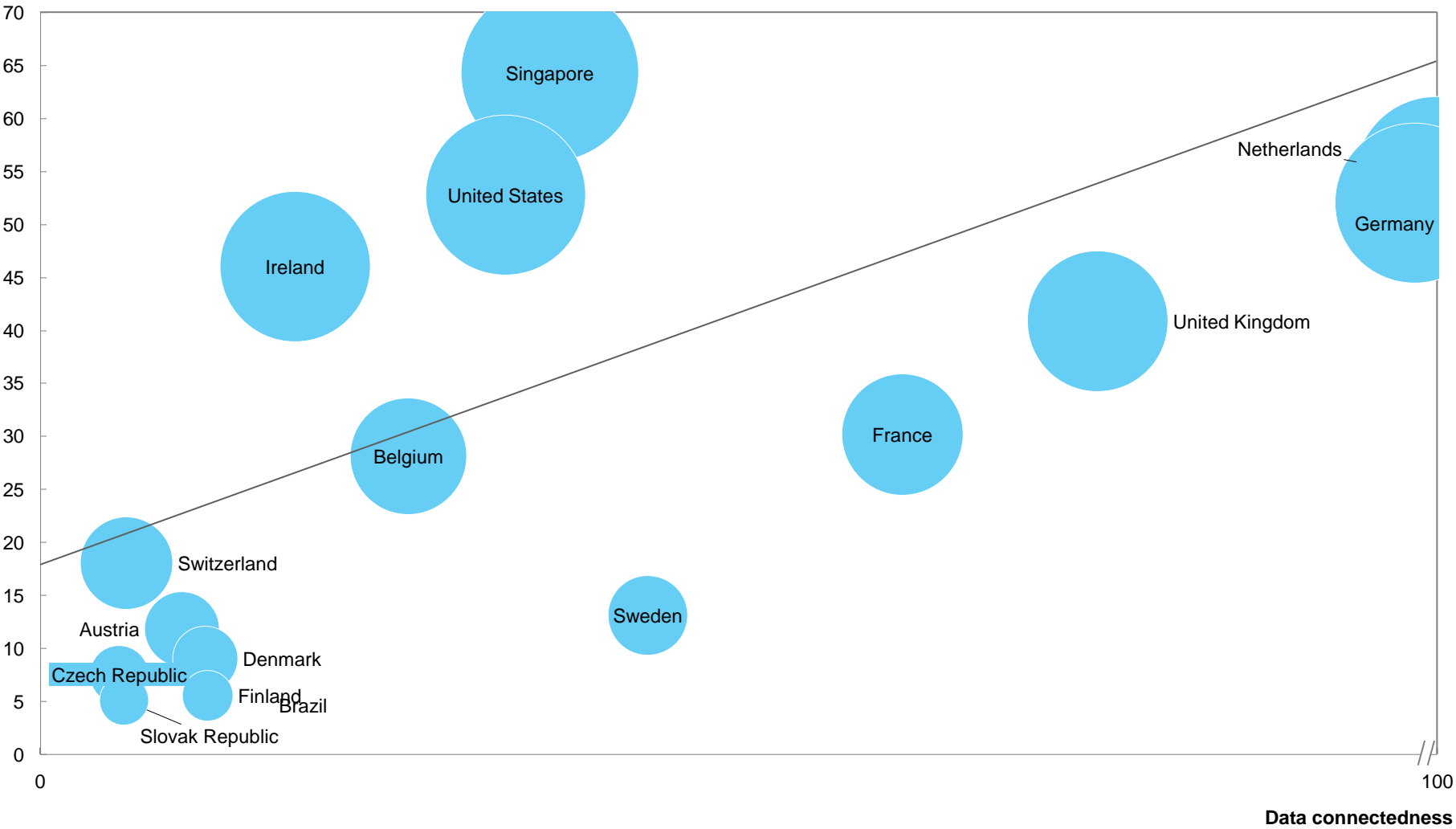
2014 **45x larger**
 100% = **211 Tbps**



Data becomes the foundation of higher connectdness

top 20 countries in data flow

Total connectedness score, 2014



SOURCE: IMF; McKinsey Global Institute analysis

Globalization: Then vs. now

20TH CENTURY

21ST CENTURY



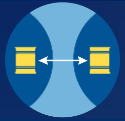
Tangible flows of physical goods

Intangible flows of data and information



Flows mainly between advanced economies

Greater participation by emerging economies



Capital- and labor-intensive flows

More knowledge-intensive flows



Transportation infrastructure is critical for flows

Digital infrastructure becomes equally important



Multinational companies drive flows

Growing role of small enterprises and individuals



Flows mainly of monetized transactions

More exchanges of free content and services



Ideas diffuse slowly across borders

Instant glow access to information



Innovation flows from advanced to emerging economies

Innovation flows in both directions



Thank you

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