

Continuing education with the banking sector

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The link between university research and banking practice runs through continuing education. In December 2019 USI announced a lifelong learning initiative of the Swiss Finance Institute in Lugano. The SFI Master Classes are intensive half-day sessions for professionals with at least ten years of experience in banking and finance. They began on 17 January 2020 with a class on "Data and Technology in Finance" given by Laurent Frésard, followed on 6 March 2020 by a class on active asset management given by Francesco Franzoni. Knowledge Exchange Seminars were to follow in collaboration with the Centro Studi Villa Negroni (CSVN), the training institution of the Ticino financial centre.¹ USI and CSVN had already launched joint Certificates of Advanced Studies in Risk Management (2016) and in Private Banking and Wealth Management (2017).²

The CSVN itself, founded in 1990 on the initiative of the Associazione Bancaria Ticinese and organized as a foundation since 2009, is described in Chapter E.I. Its most recent development concerns the institutional structure of training in Ticino. On 8 July 2026 the cantonal government approved the association of the CSVN foundation with SUPSI, which took effect on 1 September 2026. The agreement provides for "la progettazione congiunta di nuove proposte formative, il coinvolgimento reciproco di docenti e collaboratori e l'organizzazione di eventi comuni", that is the joint design of new training programmes, the mutual involvement of teachers and staff and the organization of joint events.³ The association brings the professional training of bank, insurance and fiduciary employees into the cantonal system of universities of applied sciences. For the subject of this chapter it opens the possibility of combining the CSVN's courses on compliance, tax and wealth management with SUPSI's competences in computer science, data science and artificial intelligence, which SUPSI shares with USI through IDSIA.

1 SUPSI, tax and applied research

SUPSI contributes to the financial centre in two further ways. Its Department of Business Economics, Health and Social Care (DEASS) hosts a competence centre for tax law (*Centro di competenze tributarie*), which organizes the seminars and conferences on Swiss-Italian tax matters cited in several chapters of this book, among them the conferences on cross-border successions, on Swiss banks as Italian taxpayers and on the exchange of information.⁴ Its engineering and computer science departments conduct applied research with companies of the region, often financed by Innosuisse, the federal innovation agency. Through IDSIA, which belongs to both SUPSI and USI, the university of applied sciences offers a Bachelor of Science in Data Science and Artificial Intelligence and participates in master's programmes in engineering.⁵

The banks themselves recognized the importance of technology relatively late. A study commissioned by the canton through the Centro di Studi Bancari and presented at the Lugano Banking Day in March 2018 found that the fintech sector in Ticino was more developed than expected but that half of the market participants were "still watching" (*"metà degli attori sta ancora a guardare"*). The reasons given were limited knowledge, insufficient investment capital, constraints in information technology and regulatory barriers. The then president of the bankers' association, Alberto Petruzzella, recommended that Ticino first learn to compete at national level and identify its own niche, since Zurich, Geneva and Zug led the development in Switzerland.⁶ The recommendation described the situation accurately. Lugano's comparative advantage in financial technology did not lie in competing with the large fintech hubs but in applying research and technology to the specific needs of its private banking, wealth management and fiduciary business.

In figures. The Swiss Finance Institute, established in 2006, has eight partner universities, among them USI.⁷ The USI Master in Finance lasts 18 or 24 months and offers three specializations, one of them in Digital Finance.⁸ USI and CSVN launched joint CAS programmes in 2016 and 2017.⁹ The CSVN foundation has been associated with SUPSI since 1 September 2026.¹⁰ In 2018 half of the Ticino market participants surveyed for a cantonal study were "still watching" fintech developments.¹¹

2 Notes

1. USI, "The Swiss Finance Institute realises lifelong learning" (above).



2. USI, "The Swiss Finance Institute realises lifelong learning" (above) (CAS Risk Management launched in 2016, CAS Private Banking and Wealth Management in 2017). ↩
3. Associazione Bancaria Ticinese, "La Fondazione CSVN si associa alla SUPSI" (18 August 2026, modified 21 August 2026), <https://www.abti.ch/la-fondazione-csvn-si-associa-alla-supsi/>. The director of the CSVN named in the release is Tamara Erez. ↩
4. See e.g. SUPSI, Centro competenze tributarie, conference "Novità in tema di successioni e donazioni fra Svizzera e Italia", Cadempino, 13 January 2020, https://www.supsi.ch/documents/d/deass/20200113_successioni-e-donazioni; seminar "Banche svizzere come contribuenti italiani?", Manno, 20 March 2019, https://www.supsi.ch/documents/d/deass/20190320_banche-svizzere-come-contribuenti-italiani. Both are cited in Part E. ↩
5. SUPSI, IDSIA, "Istituto", <https://www.supsi.ch/web/idsia/istituto> (Bachelor of Science in Data Science and AI at SUPSI; Master of Science in Engineering at SUPSI; Master of Science in Artificial Intelligence at USI). ↩
6. RSI, "Fintech, il futuro della piazza" (20 March 2018), <https://www.rsi.ch/info/ticino-grigioni-e-insubria/Fintech-il-futuro-della-piazza--1071992.html>. ↩
7. Swiss Finance Institute, "About us" (above); USI (Degeorge, above). ↩
8. USI, "Master in Finance" (above). ↩
9. USI (3 December 2019, above). ↩
10. Associazione Bancaria Ticinese (18 August 2026, above). ↩
11. RSI (20 March 2018, above). ↩

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