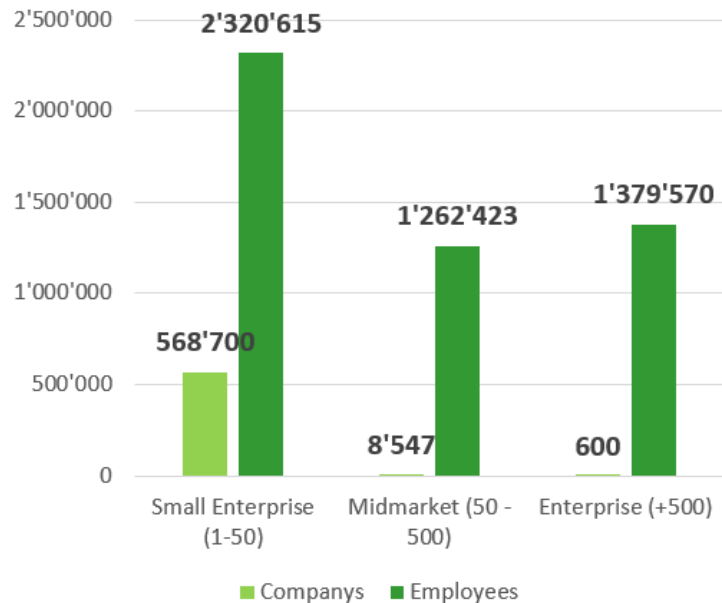


# Swiss Market Situation

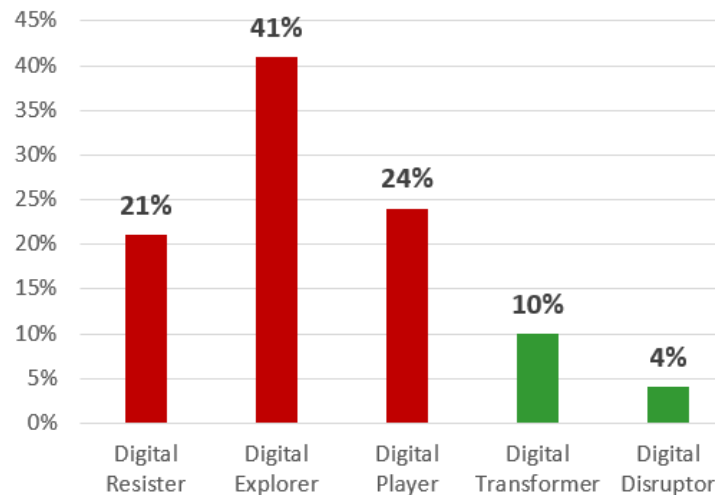


## 1 Market Structure<sup>1</sup>



Type	Companies	C %	Employees	E %
Small Enterprise (1-50)	568'700	98.4%	2'320'615	47%
Midmarket (50 - 500)	8'547	1.5%	1'262'423	25%
Enterprise (+500)	600	0.1%	1'379'570	28%
Total	577'847	100%	4'962'608	100%

## 2 Digital Market Maturity<sup>2</sup>



### Maturity

- 21% are digital resisters
- Tot. 86% at very early transformation
- Only 14% of customers transforming

### Blockers

- 45% Missing strategy
- 44% Missing resources
- 44% Missing Cultural Change

## 3 Customers investing in ...

### Where?

#### The big five:

- 1. Infra paradigm change!** from internal to external (2014 31% to 2019 64%)
- 2. IT-Security** – 2.25 billion CHF
- 3. Mobility** – 25% of IT spending
- 4. Analytics & Services** – 442 Mio CHF  
Opportunity: Managed Cloud Services
- 5. IoT** – 905 Mio Fr.

+ Blockchain, Robotics, AI, Digital Assistant

### Who?

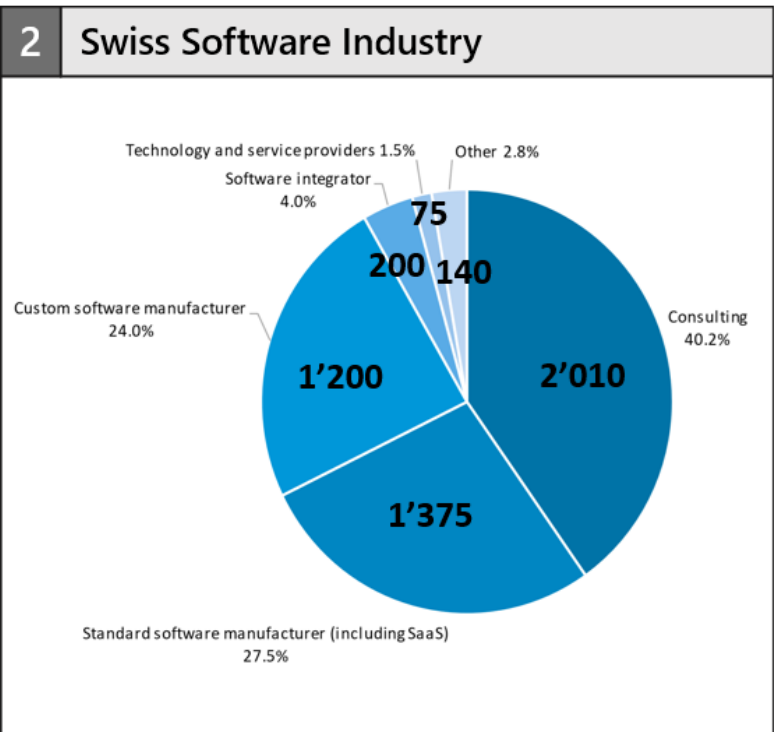
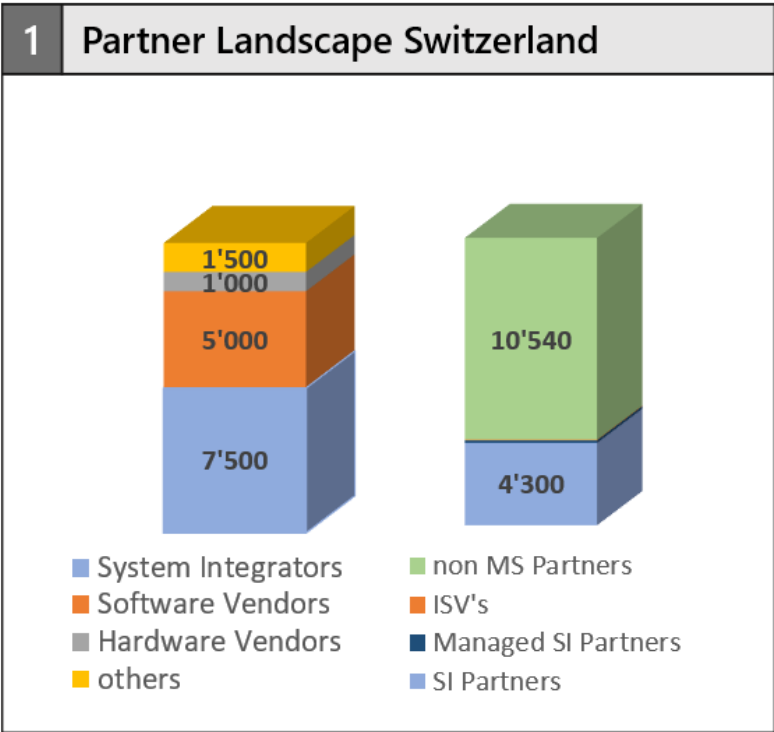
- 58% of projects from Business
- 42% of project from IT
- SMC defining pace of transformation
- 65% of tot. IT spendings from SMC

Source:

1: <https://www.kmu.admin.ch/kmu/de/home/kmu-politik/kmu-politik-zahlen-und-fakten/kmu-in-zahlen.html>

2: [https://www.pwc.ch/en/publications/2016/pwc\\_digital\\_transform\\_how\\_mature\\_are\\_swiss\\_smes\\_survey\\_16\\_en.pdf](https://www.pwc.ch/en/publications/2016/pwc_digital_transform_how_mature_are_swiss_smes_survey_16_en.pdf)

# Partner led today and tomorrow



### 3 ICT Market Development Trends 2018<sup>1</sup>

**Growth Drivers in Switzerland**

- paradigm shift to cloud
- digitalization
- analytics
- mobility
- security

**ICT B2B Revenue 2018: CHF 18b**

- 65% of IT spend is SME
- 50% of IT budget is spent by the business

Source:

1: MSM IT-Markt-Briefing Herbst Update Report 2017