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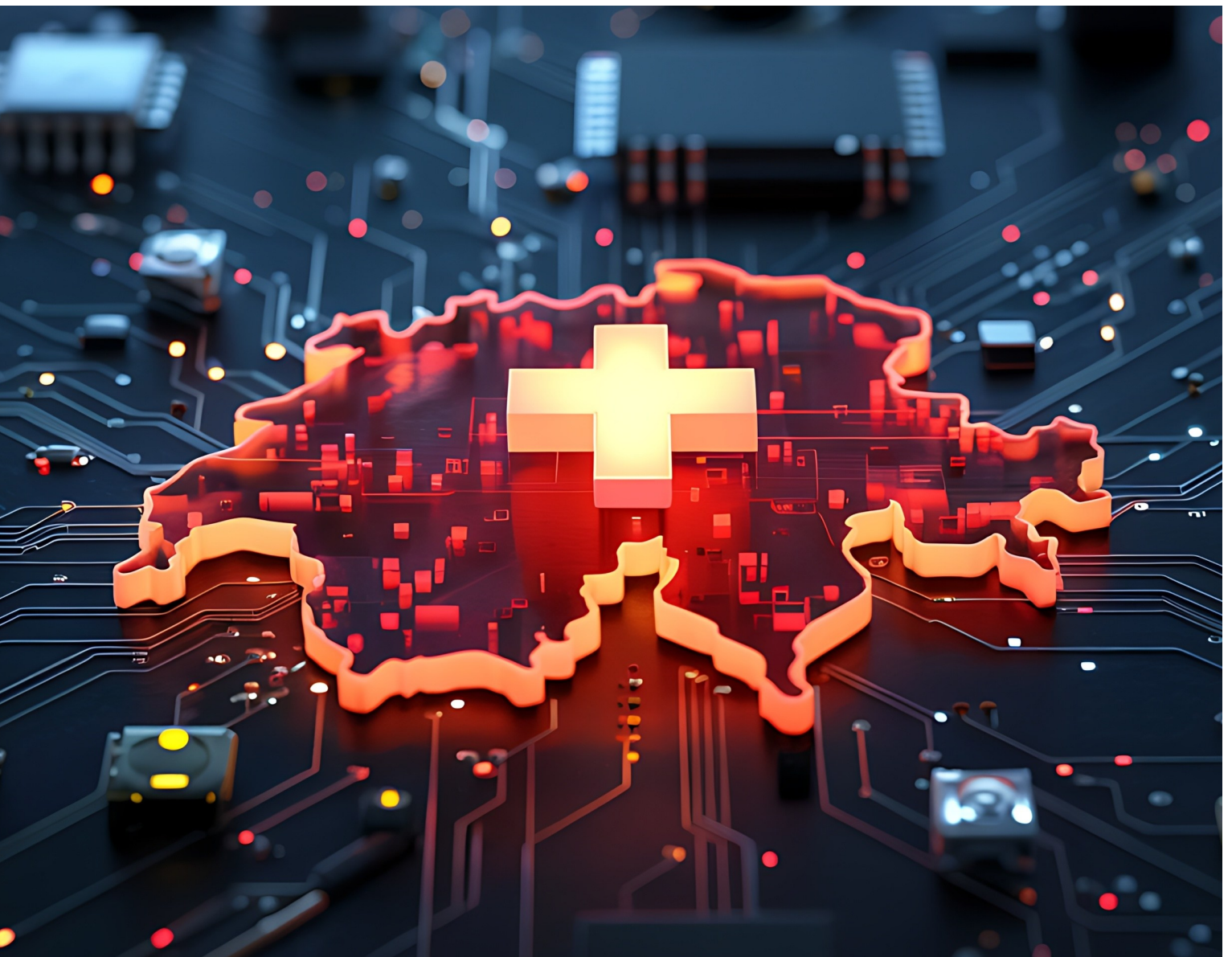
Institute of Information Systems - Information Engineering

October 2026

Swiss Software Industry Survey 2026

Current State, Emerging Trends, and Long-term Developments

A Study of the University of Bern on behalf of SWICO



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Preface

Artificial intelligence (AI) is driving profound changes in both the professional and business worlds, and the Swiss software industry is no exception. Against this backdrop, this year's special topic, **Reviewing the Value Chain in Times of AI**, examines how AI is fundamentally reshaping value creation in the software industry. AI is increasingly becoming embedded in core business processes, changing roles, workflows, and responsibilities across the entire value chain. Sourcing decisions, for example, are being reassessed and expanded to include considerations such as control over data and models, transparency requirements, and tool strategies. At the same time, AI systems are enabling new forms of organization and raising customer expectations regarding speed and efficiency.

How well prepared are Swiss software companies for this transformation, and how are they responding to the opportunities and challenges it creates? The 12th edition of the Swiss Software Industry Survey (SSIS) addresses these questions by examining the current state of AI adoption in the Swiss software industry. Among other aspects, it explores the business functions in which AI is being used, the tools that are most widely employed, and the extent to which Swiss software companies are investing in AI within their own operations. In doing so, the SSIS sheds light on how AI is affecting value chains and how companies are adapting their activities and organizational structures accordingly.

However, the SSIS Report 2026 does not focus solely on AI and its impact on industry value chains. As the most comprehensive study of its kind in Switzerland, it once again provides a detailed overview of the current state of the Swiss software industry, emerging trends, and long-term developments.

For the sixth consecutive year, the SSIS has been conducted under the patronage of Swico, the industry association for digital Switzerland. This patronage helps secure the future of the SSIS for the years to come while enabling us to maintain close ties with the Swiss ICT industry. We would therefore like to thank Swico and its Interest Group "Software, Services and Consulting" for their continued trust and look forward to further collaboration in the years ahead.

As in previous years, we would also like to thank our partners sieber&partners and tranengineering for their valuable support of the SSIS.

We hope you enjoy reading this year's SSIS Report.

Yours sincerely,

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Executive Summary

Overall, the Swiss software industry is entering a relatively stable trajectory. Profit margins increased from 6.4% in 2024 to 7.2% in 2025. Revenue is expected to decline slightly in 2026 and 2027, while employment levels are anticipated to remain relatively stable over the coming years.

AI Becoming Embedded Across the Software Value Chain

AI is increasingly used across a broad range of activities in the software industry. While software development remains a key area of application, AI is also widely used in marketing and sales, managerial tasks, contract management, and customer service. This shows that AI adoption extends beyond technical functions and is becoming embedded across both operational and business activities.

AI Reshaping the Value Chain and Customer Expectations

Beyond its growing use within companies, AI is also changing how value is created and what customers expect from software providers. With companies expecting AI to increase efficiency, productivity, and development speed, these benefits are also likely to shape customer expectations. In particular, customers increasingly expect faster development, lower solution development costs, and changes in the products and services software companies provide. AI is therefore reshaping not only internal processes, but also the market side of the software value chain and the value delivered to customers.

Autonomous AI Agents Still Play a Limited Role

Despite the increasing adoption of AI, autonomous agents currently account for only a small share of work performed within companies. 82.6% of participants report that autonomous agents perform less than 10% of their work, with 62.2% estimating the share at even less than 5%. This suggests that AI is currently used primarily as an assistive technology rather than as an autonomous workforce.

AI Usage Dominated by Proprietary Large Language Models

Claude, ChatGPT, and Microsoft Copilot are the most widely used AI tools among participating companies. All three are proprietary solutions based on large language models. The strong reliance on a small number of proprietary providers raises questions around digital sovereignty and companies' dependence on external AI platforms.

AI expenditures in 2025 show a clear focus on AI platform services, including licensing costs. Compared with other areas of AI investment, companies allocate the largest share of their spending to accessing and using existing AI platforms. This further highlights the important role of external technology providers in companies' current AI strategies.

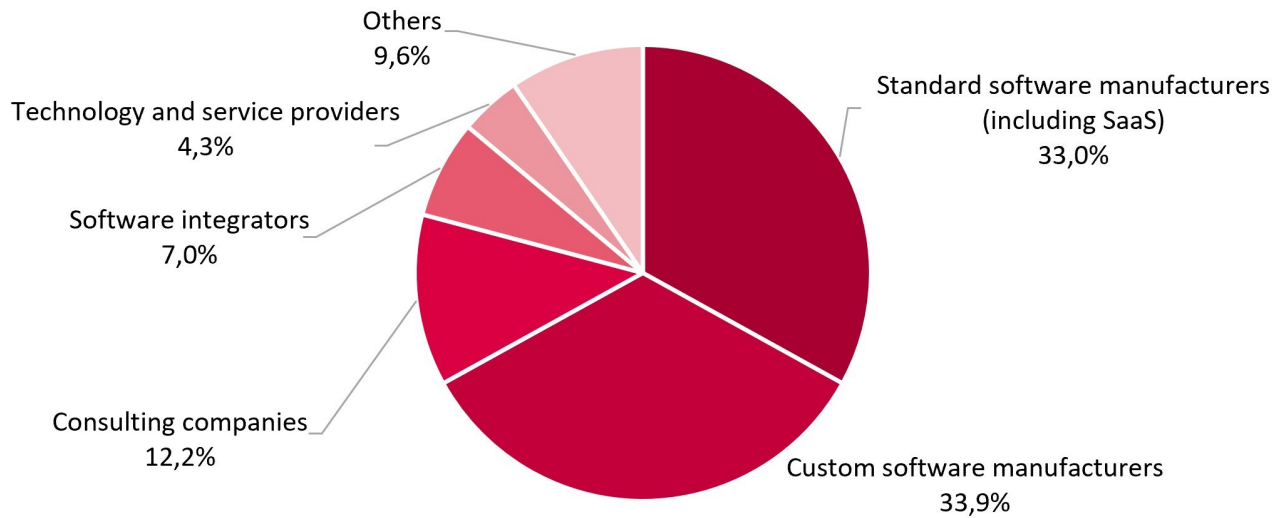
Spotlight on

Revenue, Profitability & Future Growth



Participating Companies

Figure 1: Number of companies per sub-industry as percentage of total responses



Source: SSIS 2026

N = 115

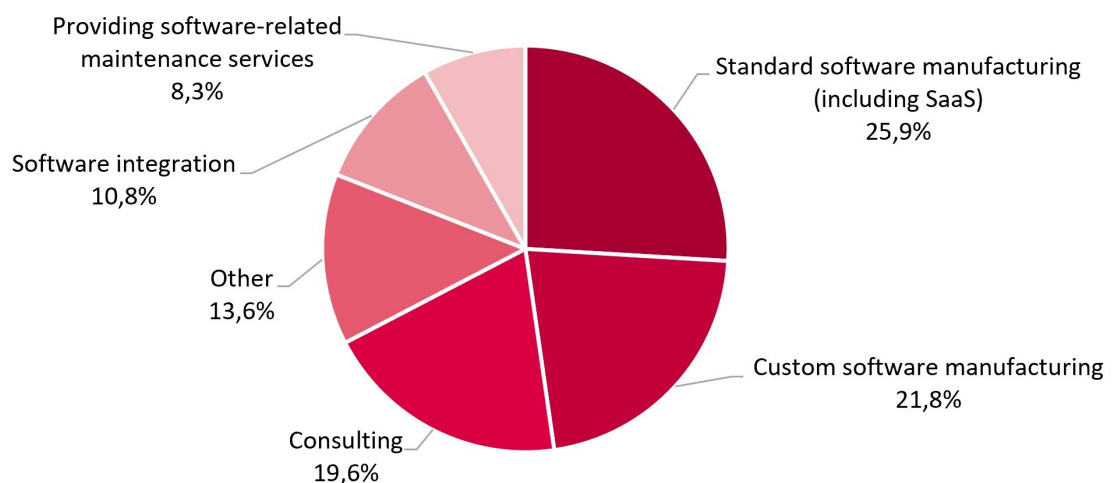
Standard and Custom Software as Main Source of Revenue

Figure 1 shows the distribution of companies participating in the SSIS 2026. As in previous years, manufacturers of standard software (33.0%) and custom software (33.9%) dominate the sample. The sample also includes companies from the sectors: Consulting companies (12.2%), software integrators (7.0%), and technology and service providers (4.3%).

Figure 2 shows the weighted revenues by activity. It indicates that standard software manufacturing is the largest source of revenue (25.9%). This is followed by custom software manufacturing with 21.8%. Software-related consulting accounts for 19.6%, while software integration contributes 10.8%. Providing software-related maintenance represents 8.3% of total revenue, and other activities make up the remaining.

Revenues by Activity

Figure 2: Revenues of Swiss software companies by activity

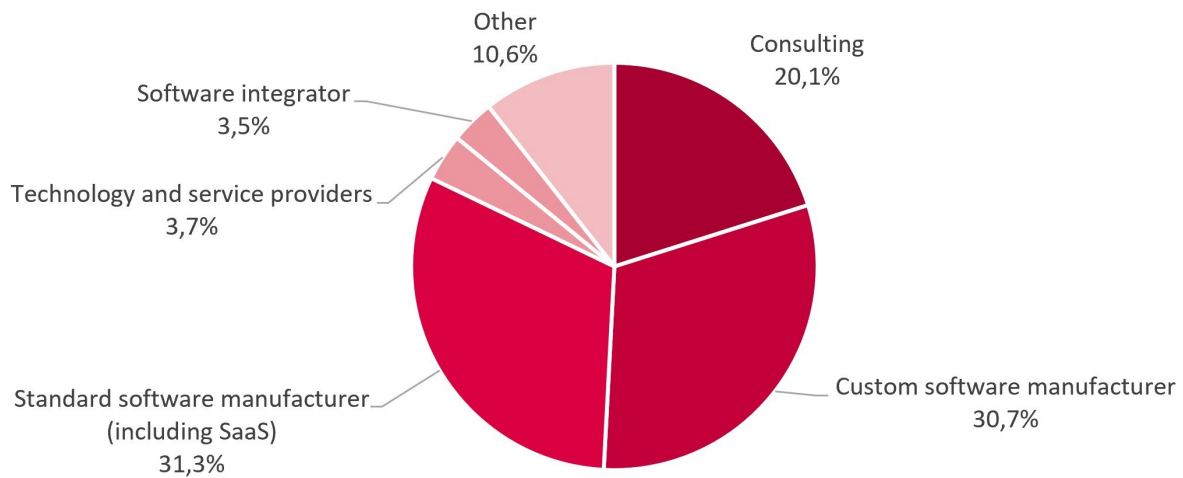


Source: SSIS 2026

N = 65

Number of Employees

Figure 3: Number of employees per sub-industry as percentage of total industry



Source: SSIS 2026

N = 106

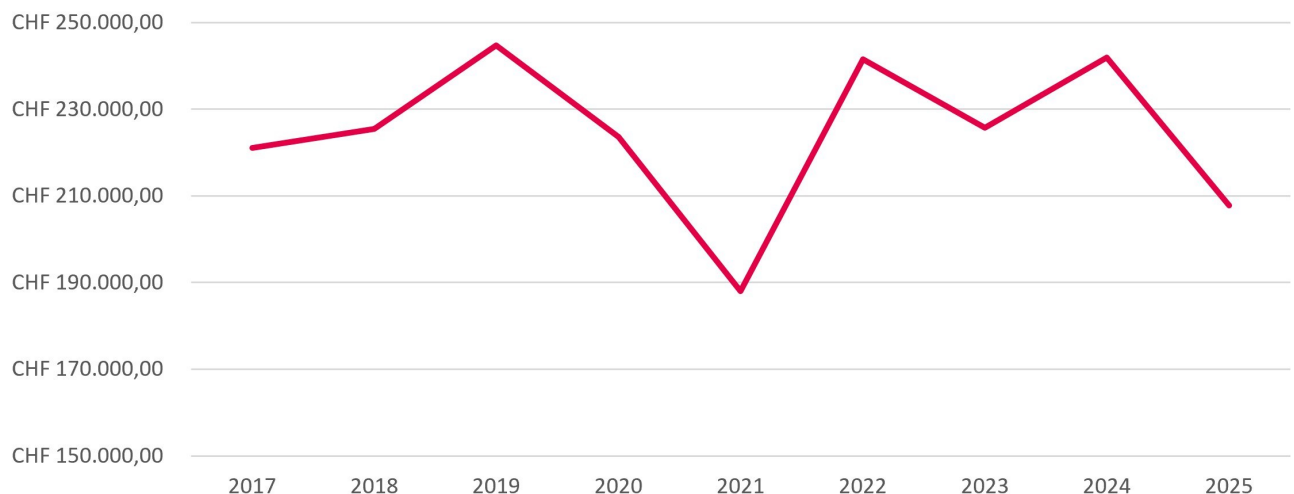
Revenue per Employee Over Time

Figure 3 shows that the majority of employees work in standard software manufacturing (31.3%), custom software manufacturing (30.7%), and the areas of consulting (20.1%). Together these three sub-industries represent roughly 80% of total employment within the software industry.

Regarding the development of revenue per employee, the values have returned to levels similar to those observed during the COVID-19 pandemic. Figure 4 illustrates a fluctuating trend, with values recovering from the 2021 low and reaching higher levels in 2022. Following a moderate decline in 2023 and a renewed increase in 2024, values fall again in 2025.

Revenue per Employee

Figure 4: Development of revenue per employee since 2017

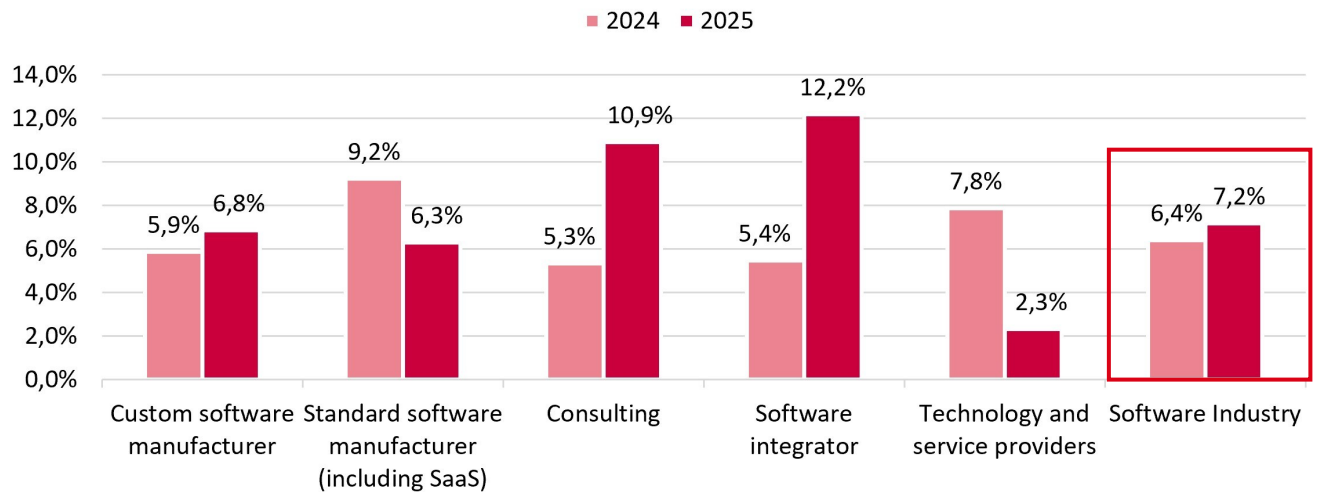


Source: SSIS 2026

N = 63

EBIT Margins

Figure 5: EBIT margins by sub-industries in 2024 and 2025



Source: SSIS 2026

N = 52

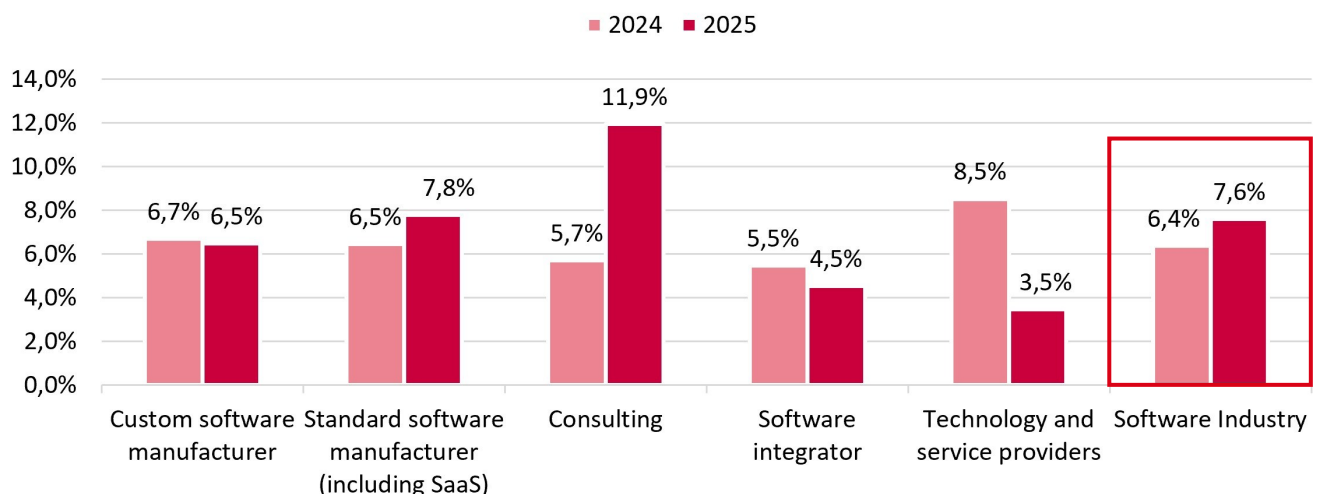
EBIT and EBITDA Margins Remain Relatively Stable

Figure 5 displays the EBIT margins of the sub-industries, revealing an industry-wide increase from 6.4% to 7.2%. This rise is prominent among custom software manufacturers (6.8%), consulting companies (10.9%), and software integrators (12.2%). In contrast, there is a decrease in the EBIT margins in the standard software manufacturing sub-industry (6.3%) and technology and service providers (2.3%).

Figure 6 presents the EBITDA margins across the Swiss software industry, with the overall industry margin increasing from 6.4% in 2024 to 7.6% in 2025. This upward trend is also reflected among consulting firms, reaching 11.9%, and standard software manufacturers, at 7.8%. In contrast, margins declined for custom software manufacturers (6.5%), software integrators (4.5%), and technology and service providers (3.5%).

EBITDA Margins

Figure 6: EBITDA margins by sub-industries in 2024 and 2025

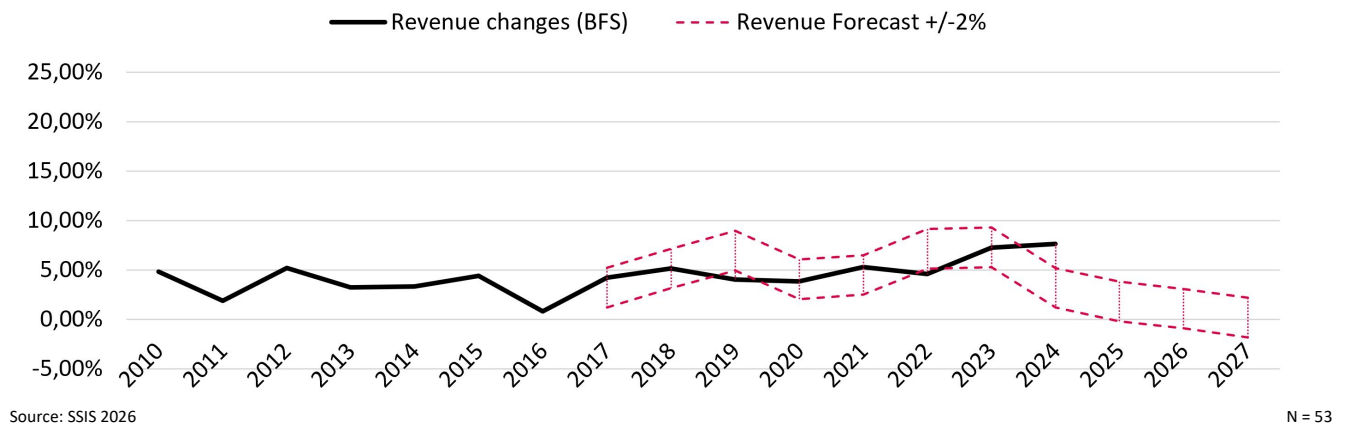


Source: SSIS 2026

N = 52

Revenue Growth Forecast

Figure 7: Expected year-over-year revenue growth



Revenue Expected to Grow Compared to Previous Years

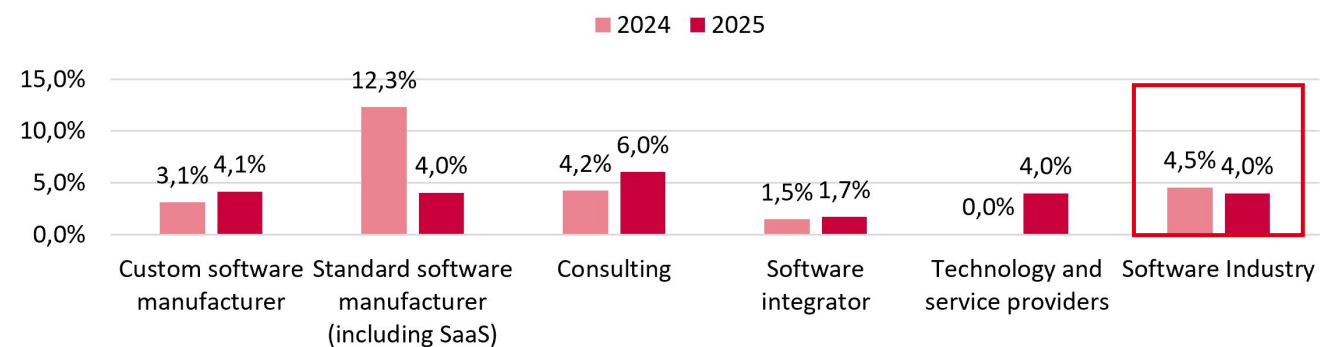
Figure 7 depicts the projected revenue growth of the Swiss software industry represented as a target range with a margin of $\pm 2\%$. Based on projections, the Swiss software industry is expected to experience a slight revenue decline of -0.26% in 2026, followed by modest revenue growth of 0.21% in 2027.

The range has been adjusted by the deviation from the official statistics of the federal statistical office (BFS).

Please be aware that this target range is merely an estimate and may be inaccurate, especially in the event of unforeseen external factors.

Research and Development Investments

Figure 8: R&D investments by sub-industries in 2024 and 2025 as percentage of revenue



Stable Trend in Research and Development Investments

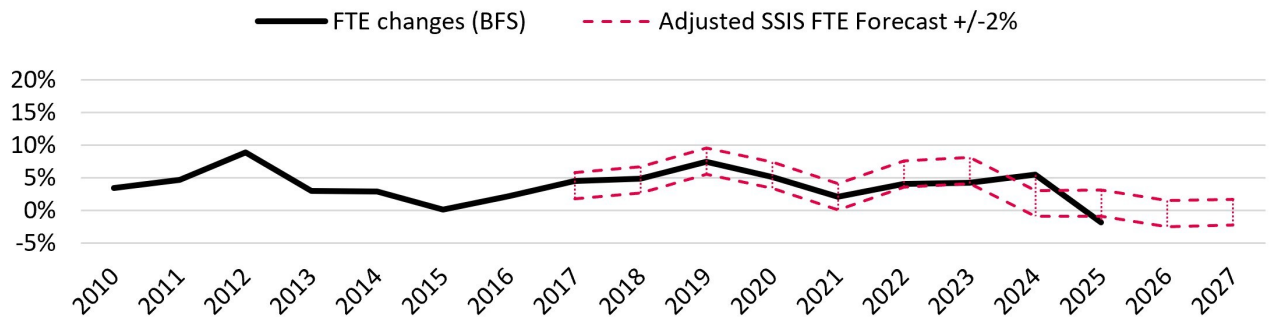
Figure 8 shows the percentage of revenue spent on research and development (R&D) by Swiss software companies in 2025 compared to 2024.

Overall, Swiss software companies invest a slightly lower portion (4.0%) of their revenue in R&D in 2025 than in 2024 (4.5%). Investments decreased for standard

software manufacturers (4.0%). However, consulting firms (6.0%), custom software manufacturers (4.1%), technology and service providers (4.0%), and software integrators (1.7%) increased their expenditure on research and development in 2025 compared to 2024.

Employee Growth Forecast

Figure 9: Expected year-over-year growth of workforce



Source: SSIS 2026

N = 106

Lower Employee Growth Forecast

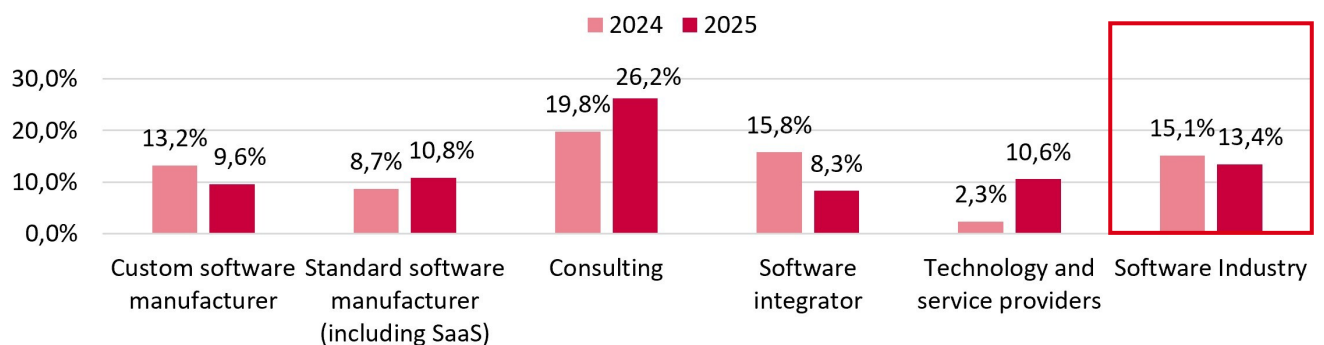
Figure 9 illustrates the anticipated growth in the number of full-time equivalents (FTEs) in the Swiss software industry, shown as a target range with a margin of $\pm 2\%$. Based on the adjusted expected deviation from the official BFS statistics, the number of FTEs in the Swiss software industry is anticipated to decline by 0.48% in 2026,

followed by a further slight decline of 0.28% in 2027.

Please be aware that this target range is merely an estimate and may turn out to be inaccurate, especially in the event of unforeseen external factors.

Employee Fluctuation

Figure 10: Employee fluctuation in 2024 and 2025 using the basic formula



Source: SSIS 2026

N = 99

Increasing Employee Fluctuation

Figure 10 shows the employee fluctuation in the Swiss software industry using the formula $[(\text{exits} / \text{headcount at the beginning of a period}) * 100]$. According to these calculations, consulting firms recorded the highest level of fluctuation in 2025 at 26.2%. The fluctuation was lower for standard software manufacturing (10.8%),

technology and service providers (10.6%), custom software manufacturing (9.6%), and technology and software integrators (8.3%). The rate of employee turnover across the entire sector decreased from 15.1% to 13.4%.

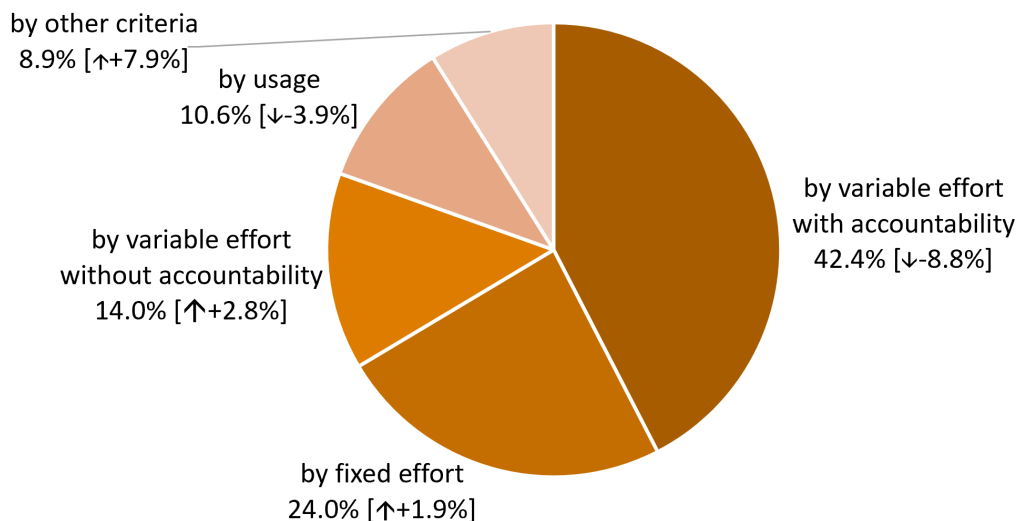
Spotlight on

Sources of Revenue



Billing Models

Figure 11: Billing models of the Swiss software industry as a percentage of industry revenue [compared to SSIS 2025]



Source: SSIS 2026

N = 65

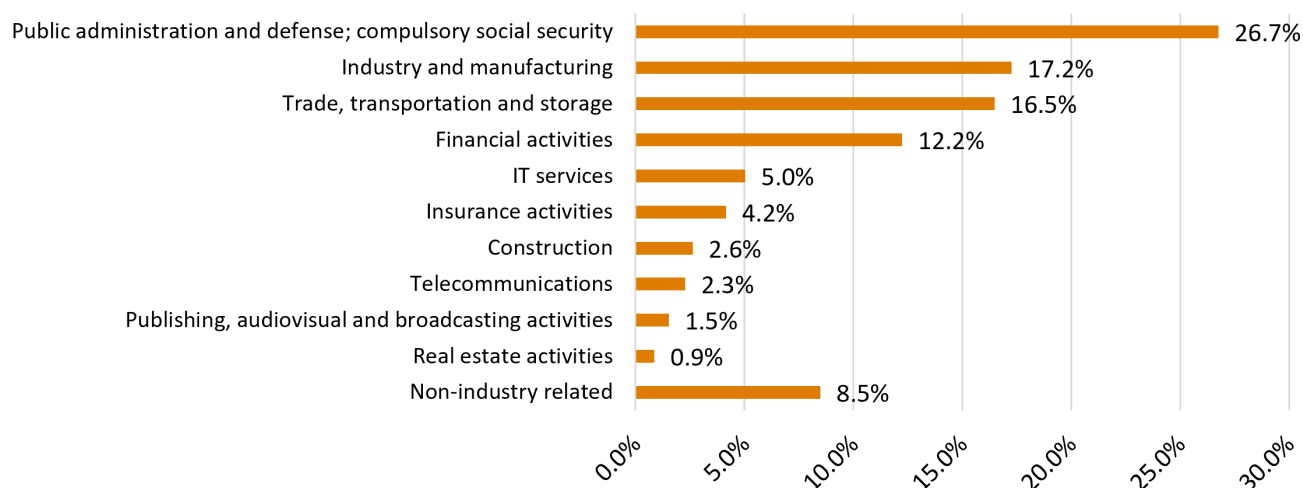
IT Services Industry: A Key Revenue Segment

Figure 11 illustrates the main billing models in the Swiss software industry. The largest source of revenue was variable effort with accountability (42.4%), followed by fixed effort billing (24.0%) and variable effort without accountability (14.0%). Contributions to total revenue were smaller for usage-based billing (10.6%) and other criteria-based billing (8.9%).

Figure 12 shows the main client industries for the Swiss software sector based on the revenue generated in each industry this year. Of the key industry categories, public administration accounted for 26.7% of total revenue, followed by industry and manufacturing at 17.2%, and trade, transportation and storage at 16.5%.

Revenue per Industry

Figure 12: Most important industries for the Swiss software industry in terms of revenue

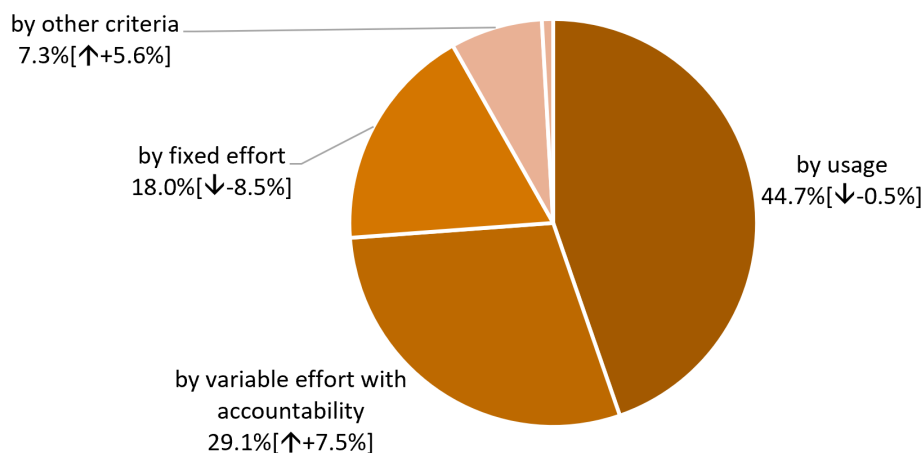


Source: SSIS 2026

N = 65

Billing Models of Standard Software Manufacturers

Figure 13: Billing models of standard software manufacturers as a percentage of the sub-industry revenue [compared to SSIS 2025]



Source: SSIS 2026

N = 19

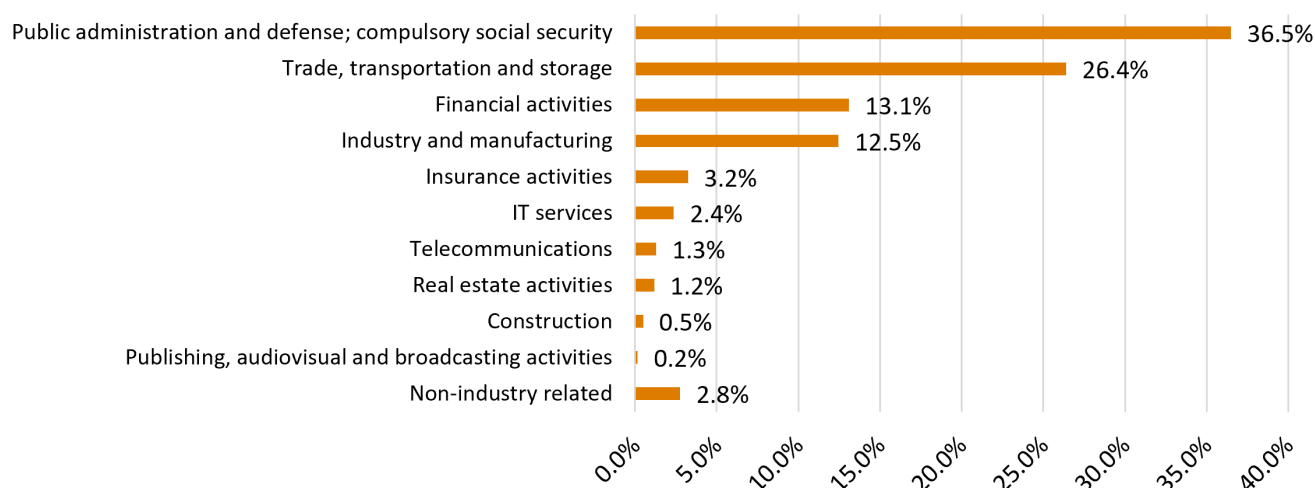
For Standard Software: Usage-Based Billing Models Still in the Lead

For standard software producers, the predominant model is usage-based billing accounting for 44.7% (see Figure 13). This reflects the growing significance of cloud-based solutions. Billing based on variable effort with accountability continues to play a key role, contributing 29.1%, while the remaining third is distributed across all other billing models (i.e., fixed effort, other criteria, and

variable effort without accountability). The public sector is the largest client industry for standard software manufacturers, accounting for 36.5% of total revenue (see Figure 14). Trade, transportation and storage rank second at 26.4%. The remaining industries account for considerably smaller shares, including financial activities at 13.1% and industry and manufacturing at 12.5%.

Revenue per Industry for Standard Software Manufacturers

Figure 14: Most important industries for the standard software manufacturers in terms of revenue

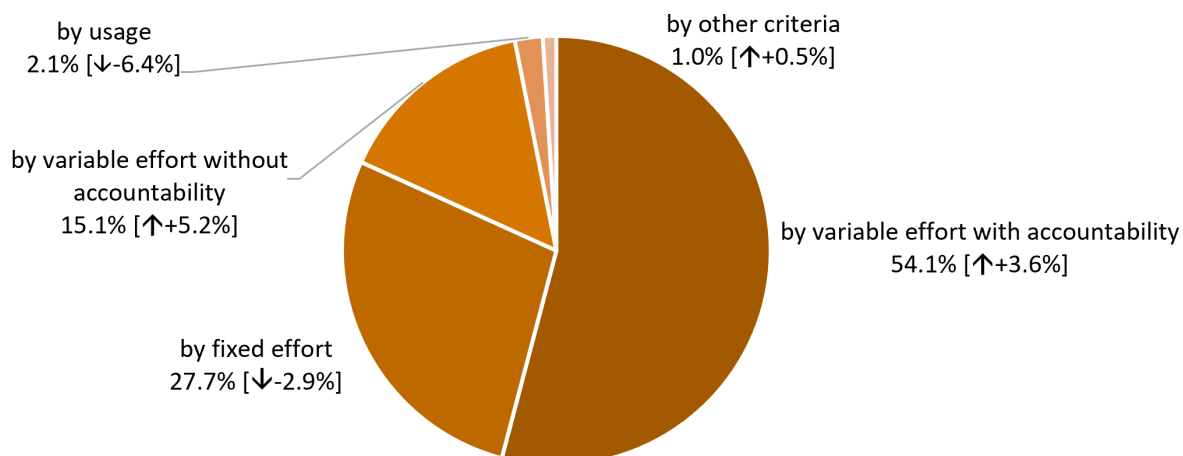


Source: SSIS 2026

N = 19

Billing Models of Custom Software Manufacturers

Figure 15: Billing models of custom software manufacturers as a percentage of the sub-industry revenue



Source: SSIS 2026

N = 26

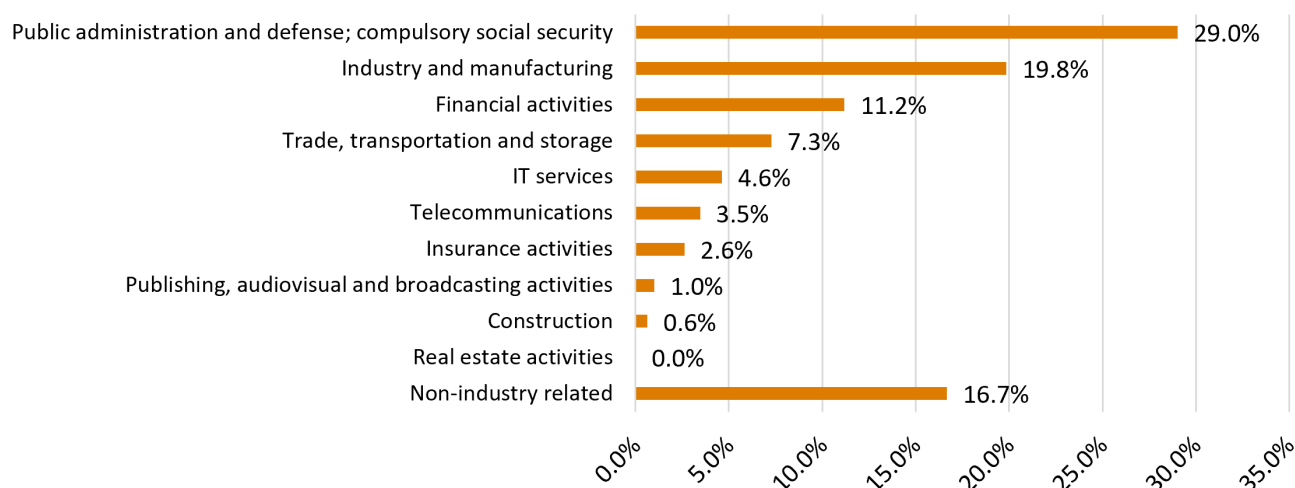
For Custom Software: High Importance of Variable Effort

As shown in Figure 15, the most common billing model for custom software producers is variable effort with accountability, accounting for 54.1% of total revenue. Fixed effort billing (27.7%) and variable effort without accountability (15.1%) are also significant contributors, whereas other billing models play only a marginal role.

Figure 16 shows the main industries for custom software manufacturers. Public administration constitute a major client segment at 29.0%, followed by industry and manufacturing activities at 19.8%, and financial activities at 11.2%.

Revenue per Industry for Custom Software Manufacturer

Figure 16: Most important industries for the custom software manufacturers in terms of revenue

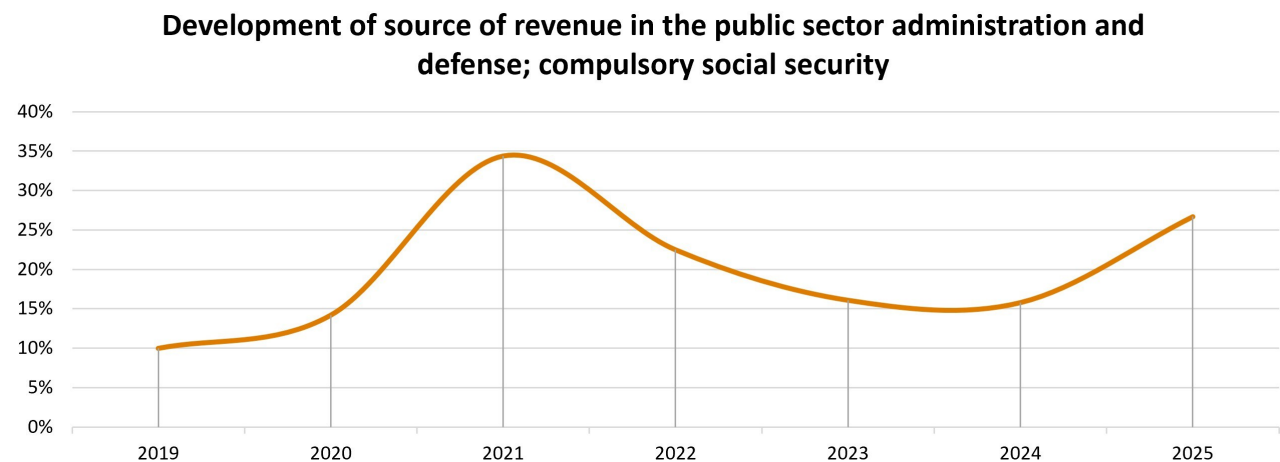


Source: SSIS 2026

N = 26

Revenue Segment Public Administration and Defense

Figure 17: Public administration industry in the Swiss software industry as a percentage of revenue over time



Source: SSIS 2026

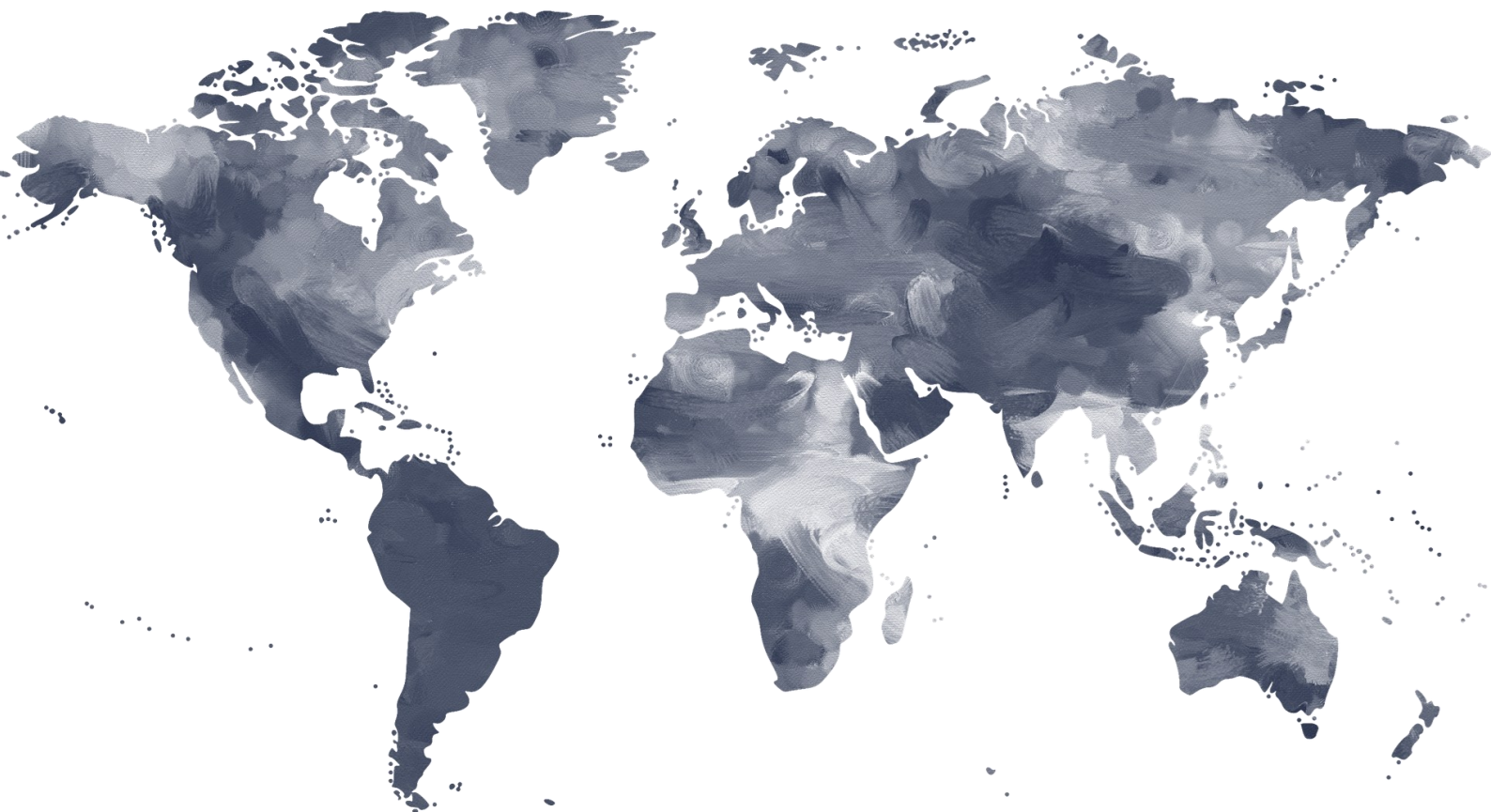
Development of Public Administration as Revenue Segment

Figure 17 shows how the revenue share attributable to public administration and defence (compulsory social security) has changed in the Swiss software industry over time. This illustration is based on revenue shares from the past five years, as reported in previous Swiss software industry surveys. An increase in this share is evident, reflecting the growing importance of the public

sector within the Swiss software industry. After peaking in 2021, the segment has shown overall growth across the five-year period. However, these figures should be interpreted with caution, as the participants of previous Swiss software industries did not consist of the same panel of participants.

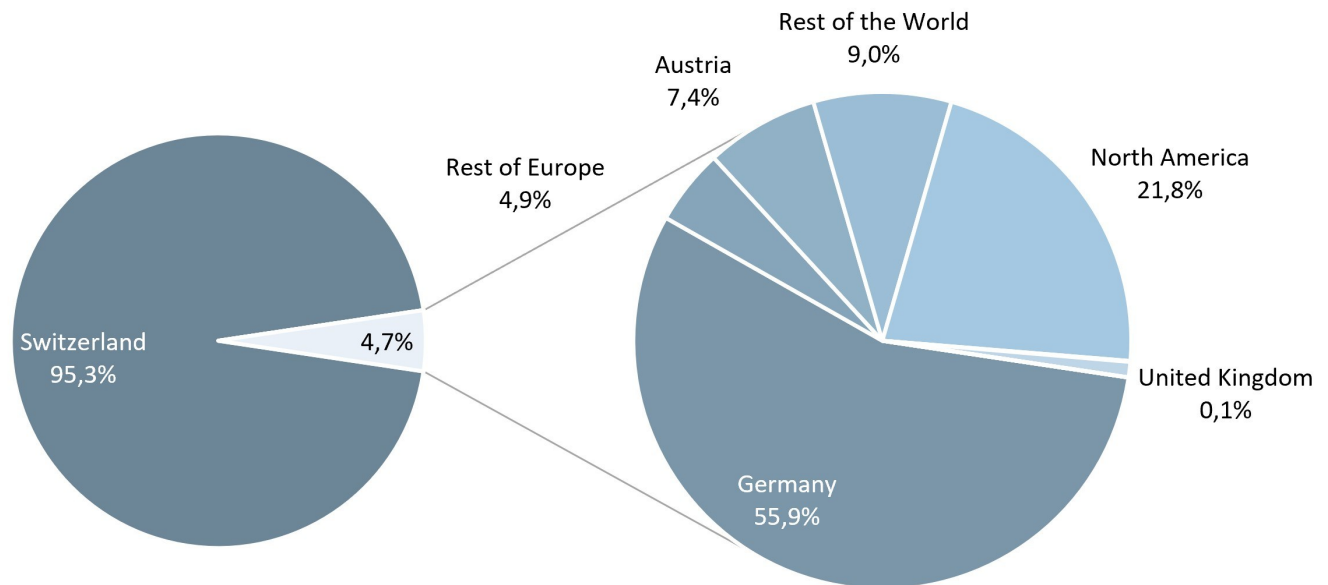
Spotlight on

Internationalization & Sourcing



Degree of Internationalization and Target Markets

Figure 18: Distribution of international revenue



Source: SSIS 2026

N = 64

The Swiss software industry generated
4.7%
 of its revenue outside Switzerland

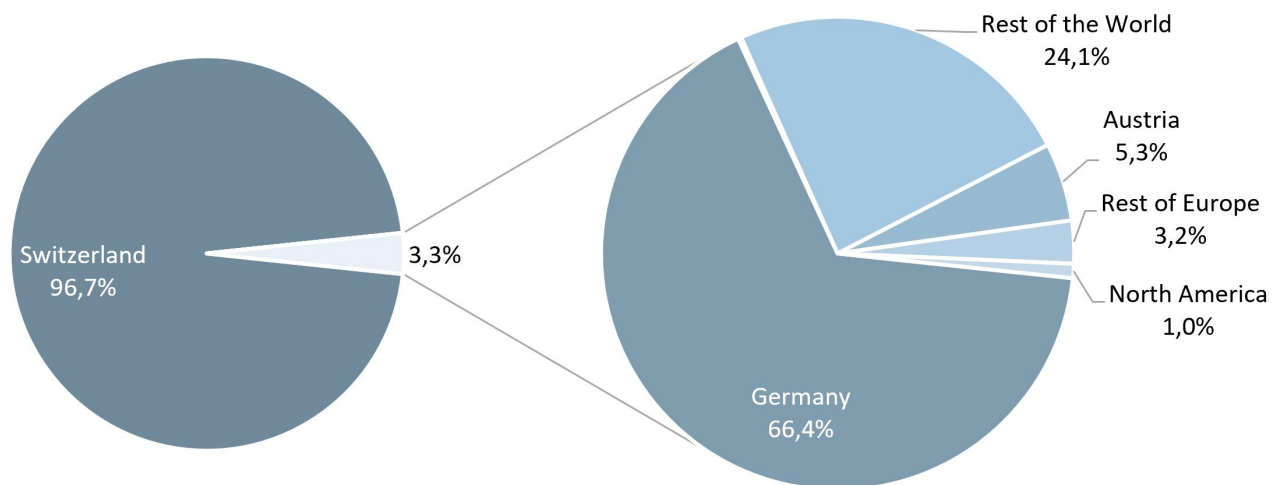
Less Revenue From International Markets

Figure 18 shows how revenue generated by the Swiss software industry is divided between domestic and international markets in 2025. The proportion of revenue generated internationally has decreased from 11.1% to 4.7%. As in previous years, Germany remains the most important export market, accounting for 55.9% of reve-

nues generated abroad. North America ranks second with 21.8%, followed by the rest of the world with 9.0%. Smaller revenue shares were generated in Austria (7.4%), the rest of Europe (4.9%), and the United Kingdom (0.1%).

Degree of Internationalization and Target Markets of Standard Software Manufacturers

Figure 19: Distribution of international revenue of standard software manufacturers



Source: SSIS 2026

N = 64

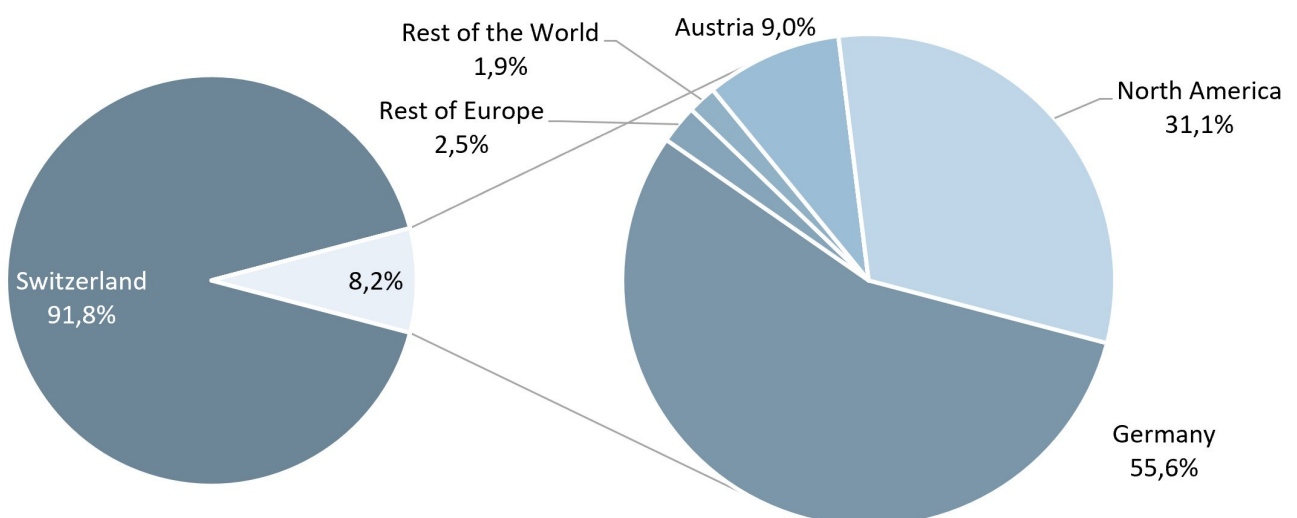
International Revenue of Standard and Custom Software Manufacturers

In the sample of 2025, 3.3% of the total revenue of standard software producers came from international markets (see Figure 19). Germany accounted for the largest share of foreign revenue (66.4%), followed by the Rest of the World (24.1%), Austria (5.3%), the Rest of Europe (3.2%), and the North America (1.0%).

As shown in Figure 20, custom software producers generated 8.2% of their total revenue from international markets. Germany accounted for 55.6% of this revenue, followed by North America (31.1%), Austria (9.0%), the rest of Europe (2.5%), and the rest of the world (1.9%).

Degree of Internationalization and Target Markets of Custom Software Manufacturers

Figure 20: Distribution of international revenue of standard custom manufacturers

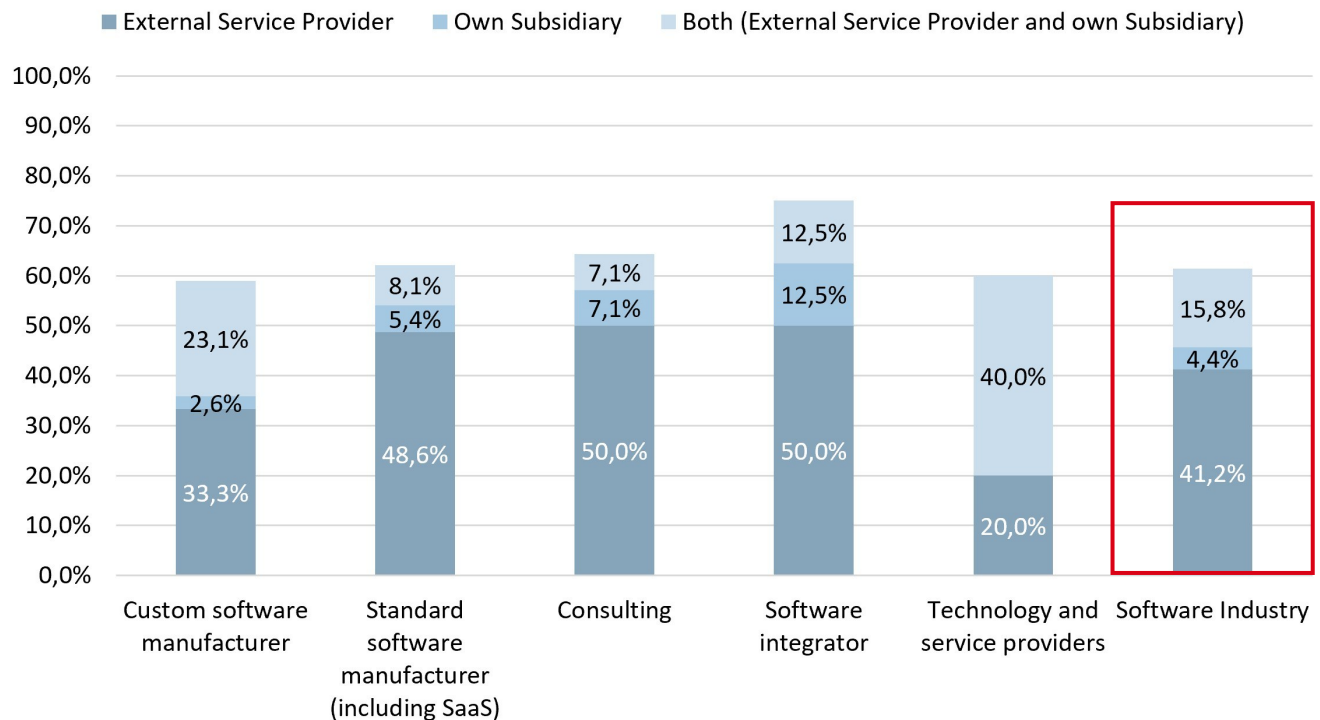


Source: SSIS 2026

N = 26

Outsourcing and Subsidiaries

Figure 21: Use of outsourcing in the Swiss software industry (in percentage)



Source: SSIS 2026

N = 114

Among Swiss software companies

61.4%

do source products and/or services

Outsourcing in the Swiss Software Industry

Sourcing, i.e. the development, improvement and operation of IT products and/or services by external service providers and/or subsidiaries, is crucial for Swiss software companies. Figure 21 illustrates the extent to which Swiss software companies engaged external service providers, relied on their own subsidiaries, or combined both approaches in 2025.

The results indicate that software integrators (75.0%) are the most likely to outsource. This is followed by consulting firms (64.2%), standard software producers (62.1%), technology and service providers (60.0%), and custom software producers (59.0%). Overall, approximately 61.4% of Swiss software companies engage in sourcing activities.

Of consulting firms, 50.0% source services from external providers, followed by software integrators (50.0%), standard software manufacturers (48.6%), custom software manufacturers (33.3%), and technology and service providers (20.0%).

In contrast, sourcing from their own subsidiaries is most common among software integrators (12.5%), followed by consulting firms (7.1%), standard software producers (5.4%), and custom software producers (2.6%).

All sub-industries obtain services from both external service providers and their own subsidiaries, led by technology and service providers (40.0%).

Spotlight on

Reviewing the Value Chain in Times of AI



Introduction to the Special Topic

Since its widespread adoption, AI has evolved greatly, going beyond mere productivity gains in individual work processes to being increasingly embedded in infrastructure, services, and products, so that a new value chain is emerging around the development and adoption of AI systems (Billones et al., 2025). This development is reflected in Deloitte's 2025 Tech Trends Magazine, which highlights the rise of GenAI features within core business systems ranging from human resources to trading and finance (Deloitte, 2025).

This shift can also be observed in the software industry. AI is reshaping the nature of developers' roles, moving the focus from routine coding tasks toward higher-level design and architectural decisions. Gurgul et al. (2026) likewise show that GenAI acts as a transformative force

in software development, reshaping workflows, governance, and role profiles.

Against this background, this survey examines whether the developments in AI have prompted companies in the Swiss software industry to review and adapt their value chains. The following chapters investigate how customer expectations and company investments have changed; assess the state of AI readiness and governance; and examine the perceived risks and opportunities of AI as well as the organizational change resulting from its integration.



The Structure of This Chapter

This chapter is structured as follows: First, it examines at which stages of the value chain AI is applied, which AI platforms are most widely used, and how frequently and to what extent employees integrate AI in their companies. The chapter continues with reports on AI investments over time and their distribution, followed by an analysis of the perceived change along the value chain and customers' expectations through AI. Subsequently, it focuses on companies' readiness for AI integration and adoption, followed by an examination of AI Governance practices. Finally the potential opportunities and risks of AI with regard to products, competition, and employee learning are assessed.

Billones, R. K. C., Lauresta, D. A. S., Delloso, J. T., Bong, Y., Stergioulas, L. K., & Yunus, S. (2025). AI ecosystem and value chain: A multi-layered framework for analyzing supply, value creation, and delivery mechanisms. *Technologies*, 13(9), 421. <https://doi.org/10.3390/technologies13090421>

Gurgul, V., Gubela, R., & Lessmann, S. (2026). The State of Generative AI in Software Development: Insights from Literature and a Developer Survey. *arXiv preprint*. <https://doi.org/10.48550/arXiv.2603.16975>

Waghulde, S., Potter, T., Borer, J., & El Rez, J. (2025, September 19). *Tech trends 2025: A perspective for the investment management sector*. Deloitte. <https://www.deloitte.com/global/en/industries/investment-management/perspectives/tech-trends.html>

Use of Artificial Intelligence: Supply Chain

Figure 22: Use of AI along the supply chain of organizations



Source: SSIS 2026

N = 111

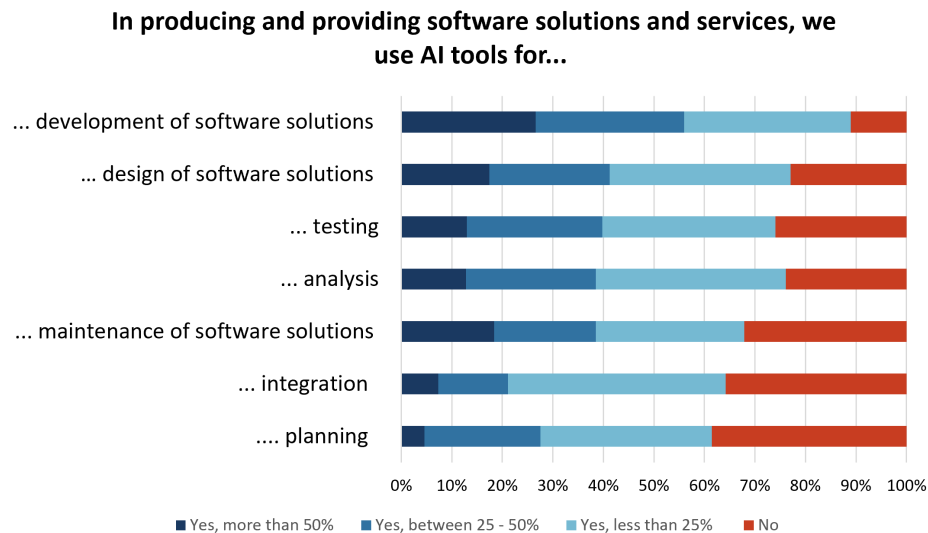
Use of AI Along the Supply Chain

Software development is where most respondents use AI, with 88.29% reporting its use in this area. This is followed by marketing and sales (68.47%) and managerial tasks (60.36%). Around half of respondents use AI in contract management (48.65%), while 35.14% report its use in customer services. Lower shares are reported for human resources (29.73%) and finance (25.23%). Procurement shows the lowest reported use among the listed functions, at 16.22%. In addition, 9.91% of respondents report using AI in other areas. Across the individual areas, reported AI use therefore ranges from 9.91% to 88.29%.

Looking at the responses from the opposite perspective, software development is the only area where more than 80% of respondents report using AI. Marketing and sales and managerial tasks also show a majority reporting AI use. Contract management is almost evenly divided, with 48.65% reporting AI use and 51.35% reporting no use. In all remaining areas, the share of respondents not using AI is higher than the share using it. This is particularly the case for procurement, where 83.78% report no AI use, followed by finance (74.77%) and human resources (70.27%).

Use of Artificial Intelligence: Usage in 2026

Figure 23: Usage of AI tools in 2026



Source: SSIS 2026

N = 109

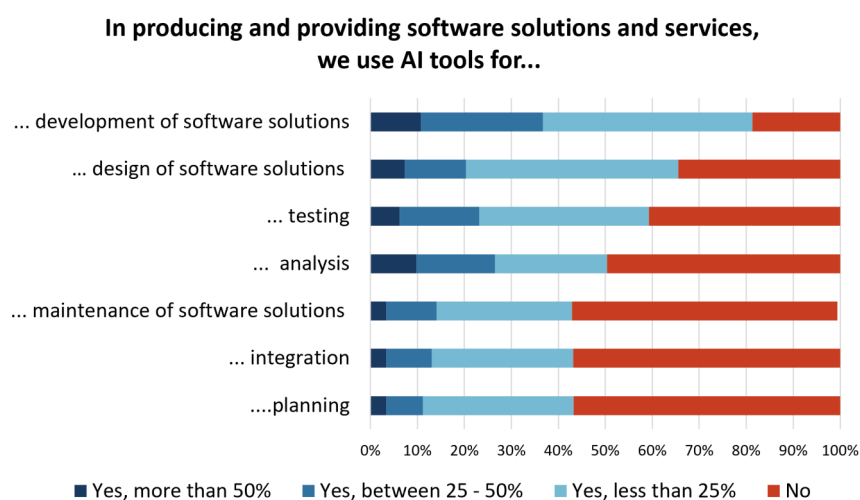
Increasing Use of AI

Figure 23 shows the use of AI in producing and providing software solutions and services in 2026, whereas Figure 24 shows the same for 2025. It can be seen that the overall usage is higher across every category in 2026. The largest increases can be seen in planning and integration, which had the lowest usage in 2025. Higher-intensity usage (more than 25%, or more than 50%) has also grown in almost every category. The ranking of activities stays broadly similar between the two years.

Development of software solutions continues to show the highest AI usage, followed by design and testing. Analysis and maintenance are positioned in the middle, while integration and planning remain the activities with the lowest overall usage. At the same time, the share reporting no AI use decreases across all activities in 2026, resulting in a more even spread of AI usage across the different stages of producing and providing software solutions and services.

Use of Artificial Intelligence: Usage in 2025

Figure 24: Usage of AI tools in 2025

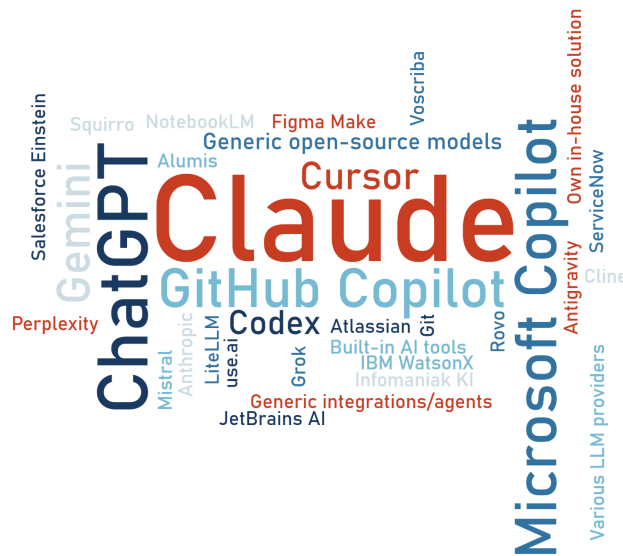


Source: SSIS 2025

N = 178

Use of Artificial Intelligence: AI Tools

Figure 25: Frequent AI tools used in software development



Source: SSIS 2026

N = 106

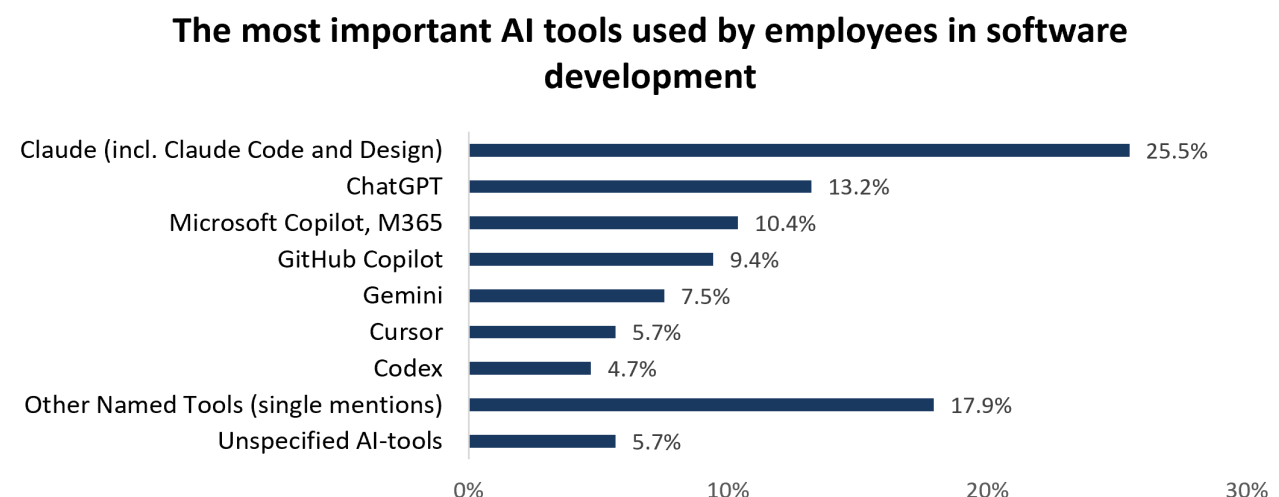
Growing AI Adoption, Driven by Proprietary Tools

Figure 25 and 26 show the AI tools that respondents use most frequently in software development. Claude (including Claude Code and Design) is the most important AI tool used by employees in software development, cited by 25.5% of respondents. ChatGPT follows at 13.2%, and Microsoft Copilot/M365 at 10.4%. GitHub Copilot is used by 9.4% of respondents, Gemini by 7.5%, and Cursor by 5.7%. Codex is cited by 4.7%. The market

is also highly fragmented: 17.9% of responses named tools mentioned only once (e.g., Grok, Perplexity, or Mistral), and 5.7% referred to AI tools without specifying them (e.g., "LLM"). Overall, AI tool use is concentrated on a few leading providers, while the long tail of individual mentions reflects the broad variety of tools available on the market.

Use of Artificial Intelligence: AI Tools

Figure 26: Most frequent used AI tools in software development

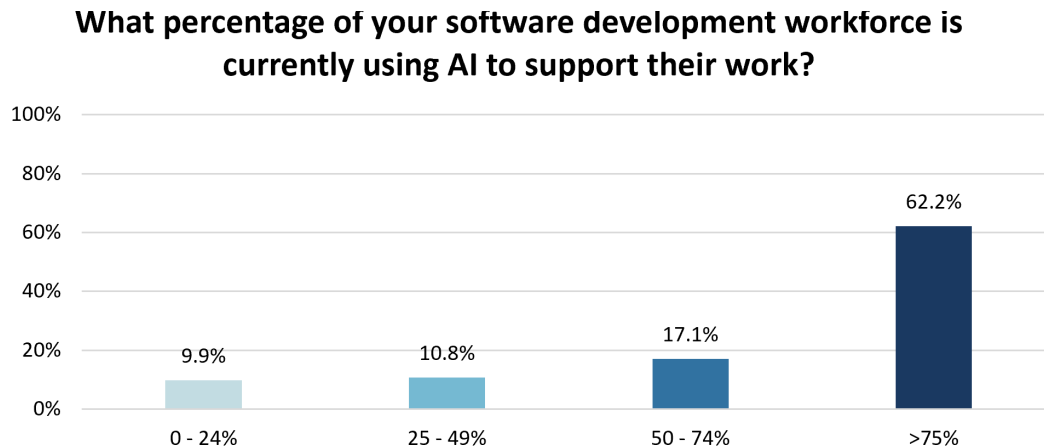


Source: SSIS 2026

N = 106

Use of Artificial Intelligence: Workforce using AI

Figure 27: AI usage in software development workforce



Source: SSIS 2026

N = 111

AI as Collaborative Partner

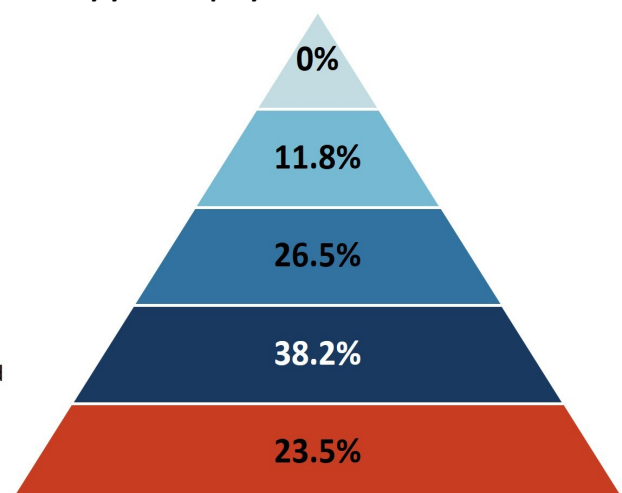
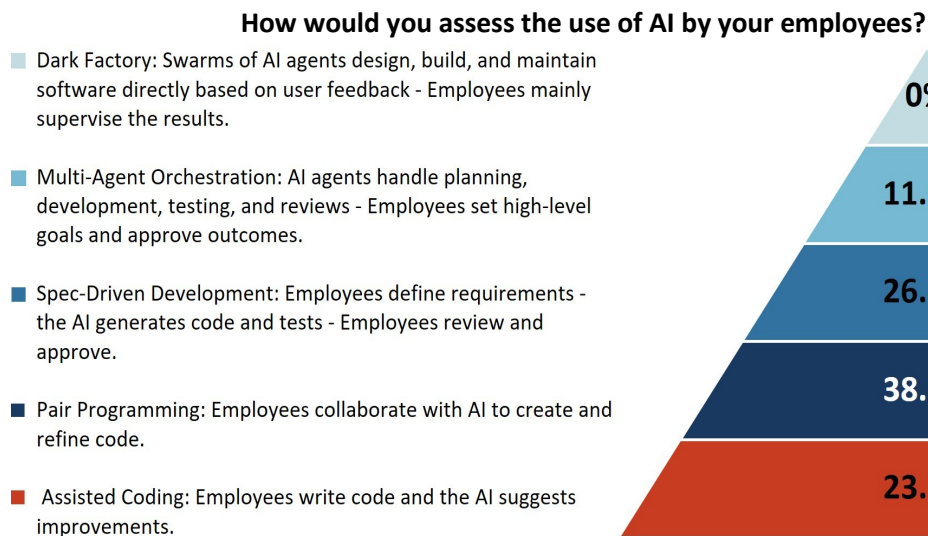
In Figure 27, it can be seen that for the majority of respondents (62.2%), more than 75% of their software development workforce is currently using AI to support their work. A further 17.1% report that 50-74% of their workforce uses AI, while 10.8% report 25-49% and 9.9% report less than 24%.

Figure 28 shows that most firms integrate AI at intermediate levels. The most common mode is Pair Programming (38.2%), where employees and AI create and re-

fine code together. It is followed by Spec-Driven Development (26.5%), where employees define requirements and review AI-generated code, and Assisted Coding (23.5%), where AI suggests improvements to code written by employees. Only 11.8% use Multi-Agent Orchestration, and no firm states to operate a fully autonomous Dark Factory. AI therefore acts mainly as a collaborative partner, while humans keep control over code creation and quality assurance.

Use of Artificial Intelligence: Workforce using AI

Figure 28 : Level of AI integration in software development



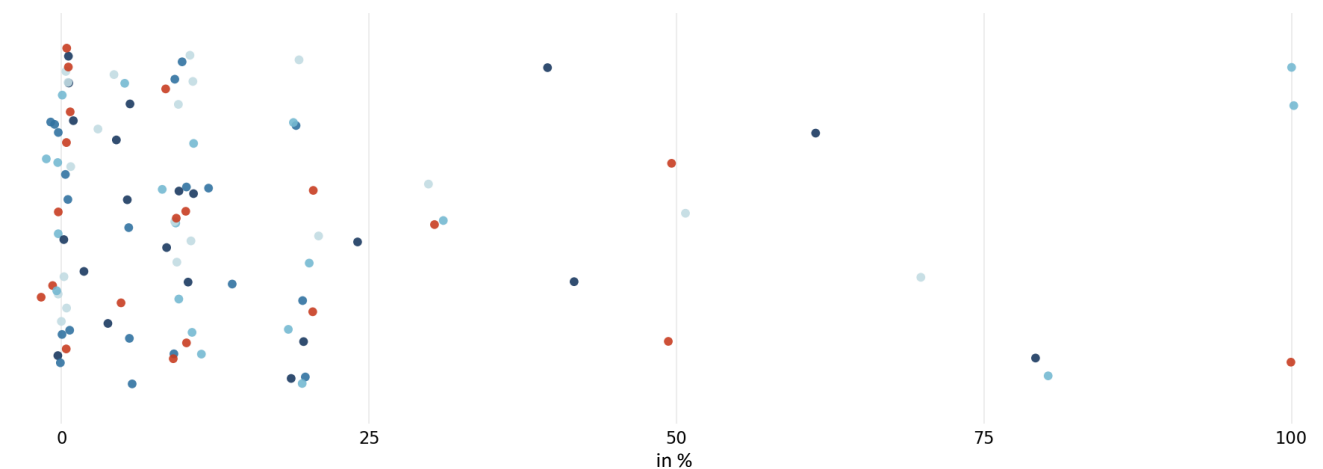
Source: SSIS 2026

N = 102

Use of Artificial Intelligence: AI Products

Figure 29: Solutions sold to customers including AI as a functional component

What percentage of the solutions sold to customers in 2025 included AI as a functional component of the delivered product?



Note: Colors are used solely to distinguish individual data points more clearly; color does not convey any additional information.
Source: SSIS 2026

N = 101

AI Solutions and Use of Autonomous Agents

Figure 29 shows the share of solutions sold to customers that included AI as a functional component of the delivered product. More than half of the firms (56.4%) report that AI was part of at most 10% of their solutions, and another 23.8% report a share of 10–20%. Only 6.9% report AI as a functional component in more than half of their solutions, including 3.0% with shares above 90%. Hence, AI mainly supports development, and only

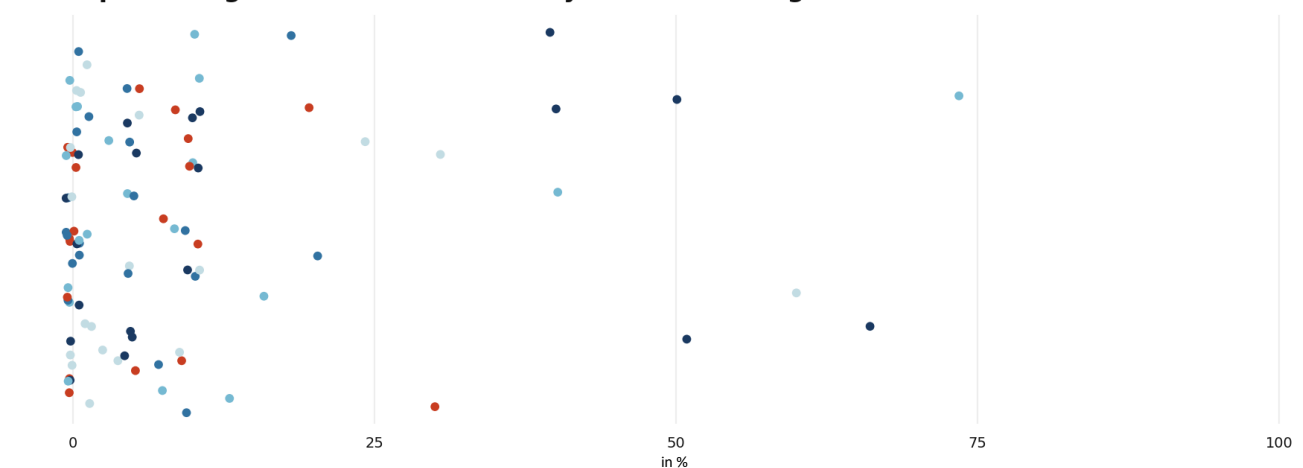
a small group of firms offers solutions with AI as a core component.

Figure 30 shows the share of work done by autonomous agents. Most firms (62.2%) report that agents perform at most 5% of the work, and another 20.4% report 5–10%. Only 4.1% report that agents do more than half of the work. Hence, autonomous agents still play a minor role in most firms, and only a few rely on them for a substantial part of their work.

Use of Artificial Intelligence: Autonomous Agents

Figure 30: Use of autonomous agents

What percentage of the work is done by autonomous agents?

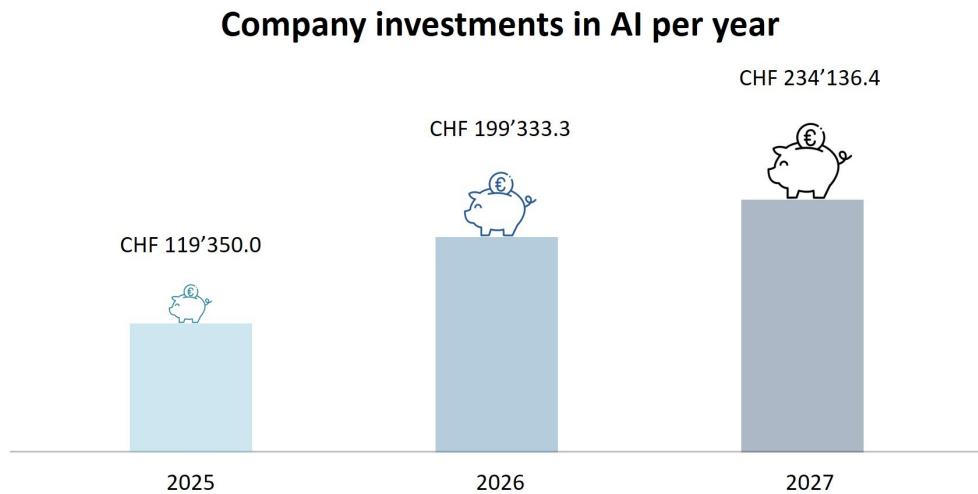


Note: Colors are used solely to distinguish individual data points more clearly; color does not convey any additional information.
Source: SSIS 2026

N = 98

AI Investments: Investments per Year

Figure 31: Company investments in AI per year (Average in CHF)



Source: SSIS 2026

N = 103

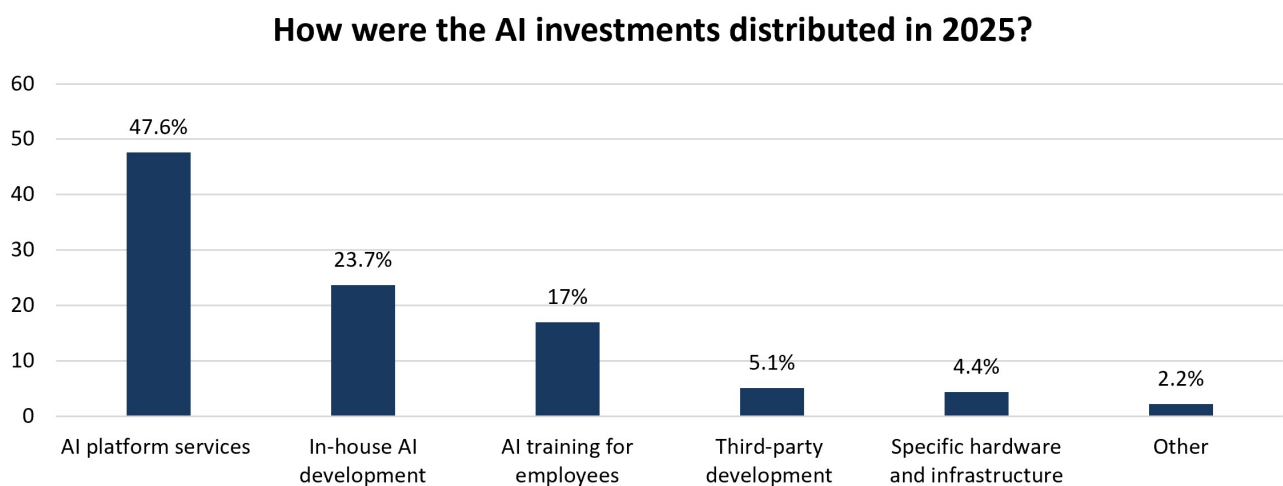
Growing Investments Primarily in AI Platform Services

Figure 31 shows that annual AI investments averaged around CHF 119'000 in 2025 and are expected to increase substantially to CHF 199'000 in 2026 and CHF 234'000 in 2027. This indicates a clear intention among companies to expand their financial commitment to AI in the coming years.

Figure 32 shows that almost half of AI investments in 2025 are allocated to AI platform services (47.6%), followed by in-house AI development (23.7%) and employee AI training (17.0%). Third-party development, hardware and infrastructure, and other investments account for considerably smaller shares.

AI Investments: Distribution of Investments

Figure 32: Distribution of AI investments

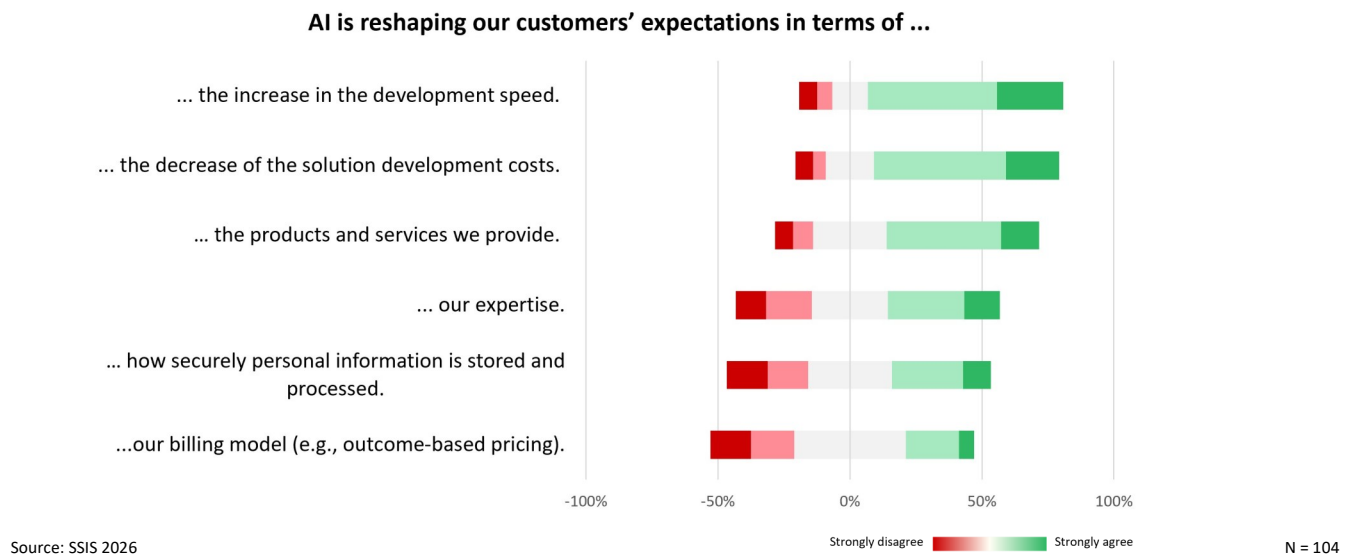


Source: SSIS 2026

N = 72

Change through Artificial Intelligence: Customer Expectations

Figure 33: Change of customer expectations through AI



Changing Customer Expectations for Lower Cost and Faster Development

Figure 33 shows that AI is changing customer expectations particularly regarding faster development and lower solution development costs. Changes in products and services are also noticeable, while expectations regarding expertise, data security and billing models are more mixed. At the same time, Figure 34 shows that AI integration across the value chain is still at an early stage in many companies: 69.4% report either isolated use

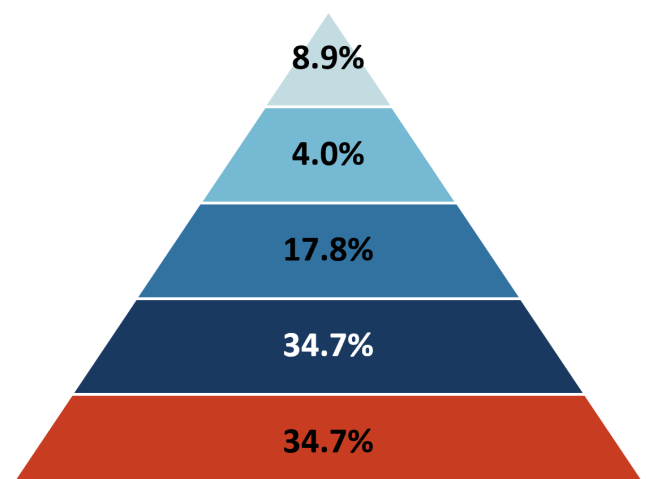
or structured use across multiple stages. Process optimization is reported by 17.8%, while network redesign and broader changes to partner, supplier and customer relationships remain relatively rare. More extensive transformation remains less common, with only a small share reporting AI at the core of their business model.

Change through Artificial Intelligence: Value Chain Change

Figure 34: Integration of AI along the value chain

To what extent has AI changed how your company creates value - from acquisition to operations?

- 5) Business model transformation: AI is at the core of the company's value proposition and business model
- 4) Network redesign (BNR): AI is also reshaping partner, supplier, and customer relationships.
- 3) Process optimization (BPR): AI has fundamentally redesigned existing processes.
- 2) Multiple stages: AI supports several areas in a structured way, but not end-to-end.
- 1) Isolated use: AI is used occasionally in individual stages of the value chain.



Source: SSIS 2026

N = 101

AI-Readiness: Resources

Figure 35: Organizational resources for AI change



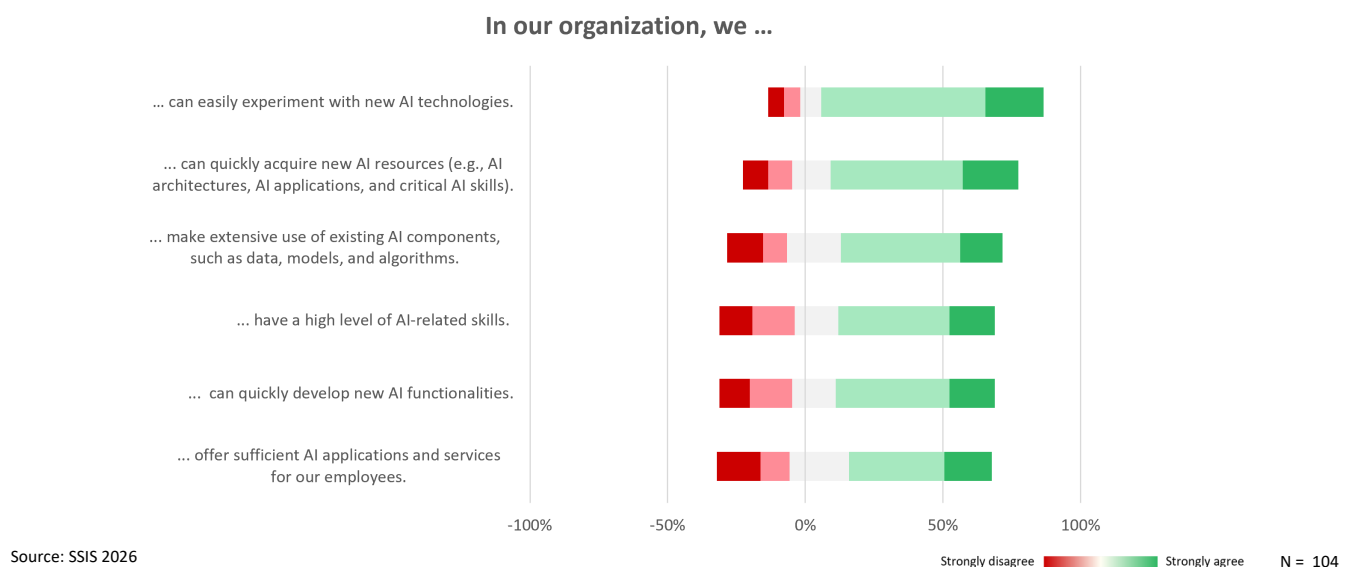
AI Readiness Builds on Resources and Adaptability

Figure 35 shows that companies generally have a solid resource base for AI initiatives, particularly regarding expertise and the required software platforms. Necessary hardware and sufficient funding are also available in many organizations. However, assessments are more mixed regarding the availability of enough team members to carry out AI projects. Figure 36 shows that companies are particularly well positioned to experiment

with new AI technologies and acquire new AI resources when needed. The use of existing AI components is also relatively widespread. At the same time, assessments are more mixed regarding AI-related skills and the ability to quickly develop new AI functionalities. Providing sufficient AI applications and services for employees also remains a challenge.

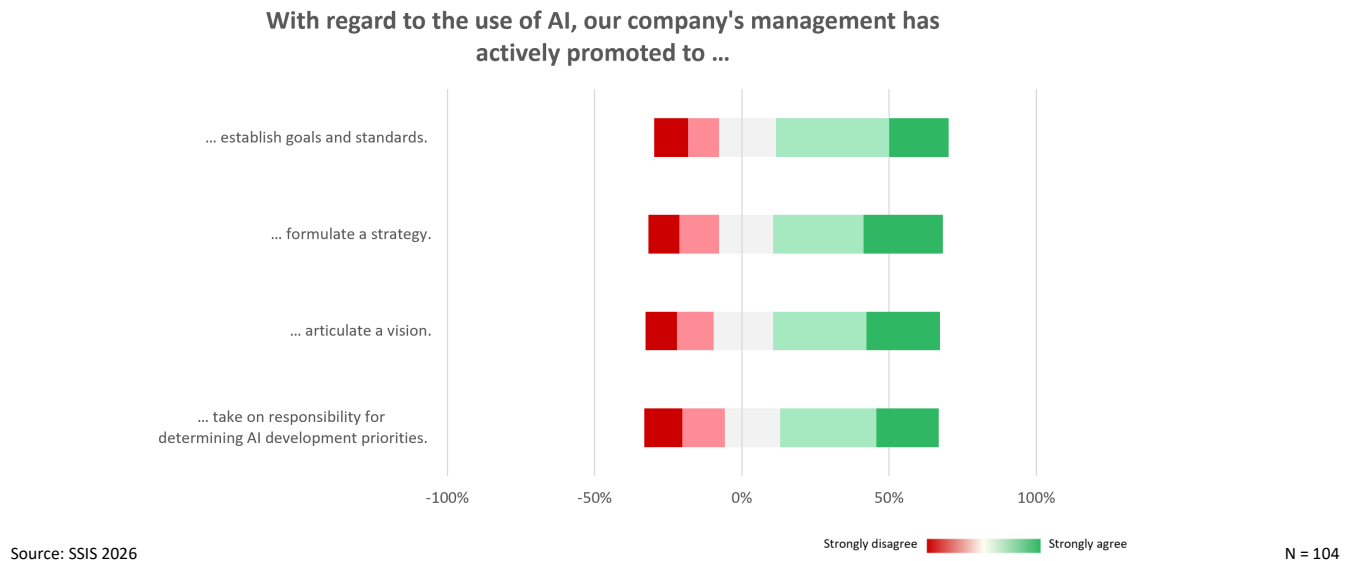
AI-Readiness: Adaptability

Figure 36: Adaptability to AI change



AI Governance: Role of Management

Figure 37: Management's role in promoting AI governance



AI Governance Requires Strategy and Formal Structures

Management plays an active role in shaping AI use by establishing goals and standards, formulating a strategy and articulating a vision (see Figure 37). Taking responsibility for determining AI development priorities further underlines management's strategic role in guiding AI adoption. However, Figure 38 shows that formal governance structures and practices are less consistently established. Guidelines for responsible AI use and dedica-

ted competence teams are among the more common measures, while formal processes for governance, training and oversight vary considerably. In particular, processes for AI budgeting and measuring the success of AI projects appear less widespread, suggesting that the operationalisation of AI governance is still developing in many companies.

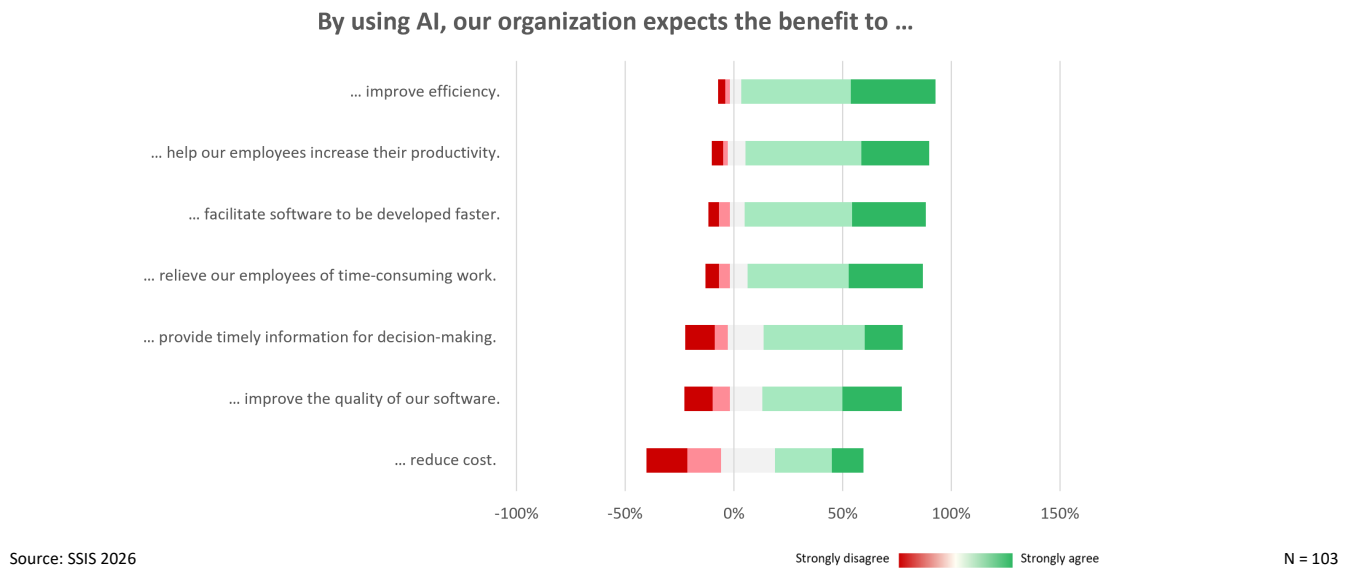
AI Governance: Practices

Figure 38: Implementation of AI governance practices



Opportunities and Risks of AI Use: Benefits

Figure 39: Expected benefits of AI in software development



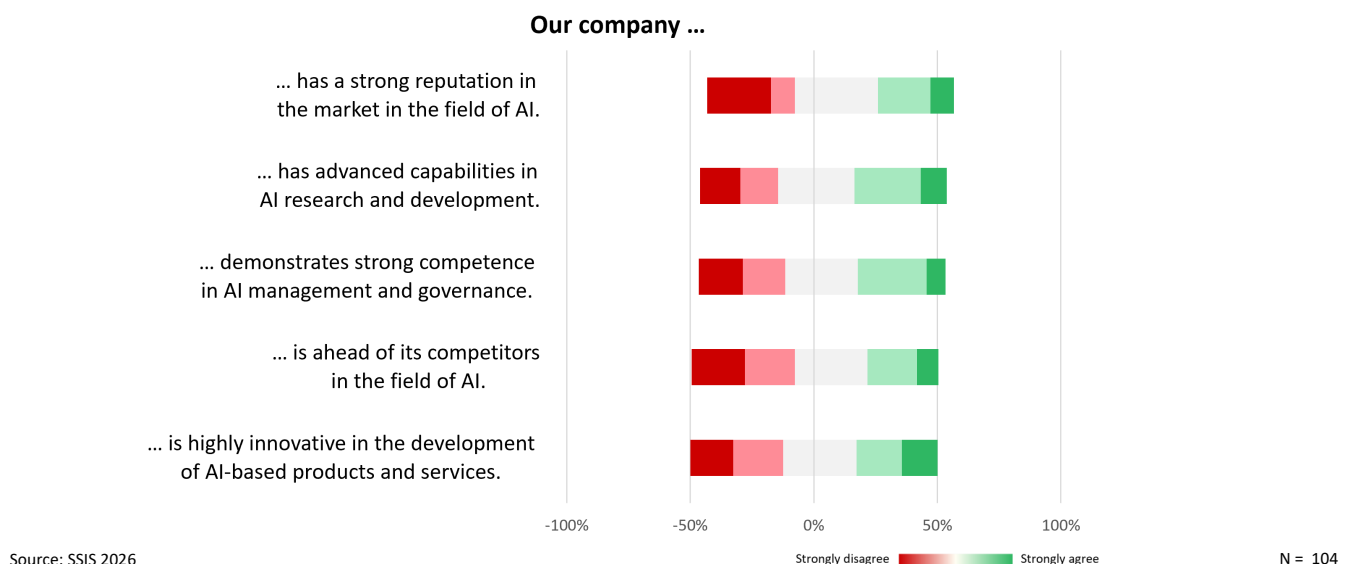
AI Promises Efficiency Gains but Competitive Positioning Remains Challenging

Companies primarily expect AI to improve efficiency, increase employee productivity and accelerate software development (see Figure 39). Relieving employees of time-consuming work is another frequently expected benefit. In contrast, reducing costs appears to be a less prominent expectation.

Figure 40 shows a rather cautious assessment of companies' competitive position in AI. While some companies report advanced AI capabilities and competencies, fewer see themselves as clearly ahead of competitors or highly innovative in developing AI-based products and services. This indicates considerable room for further strengthening AI capabilities and market positioning.

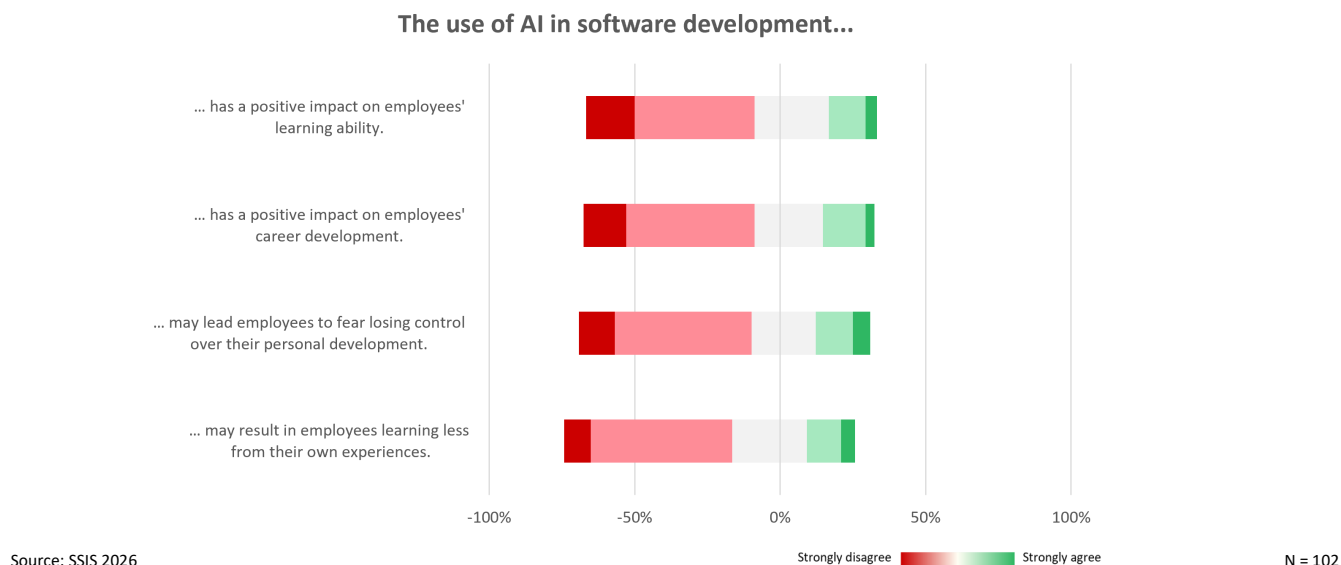
Opportunities and Risks of AI Use: Competitive Pressure

Figure 40: Competitive positioning in the field of AI



Opportunities and Risks of AI Use: Employees

Figure 41: Impact of AI use on employee development



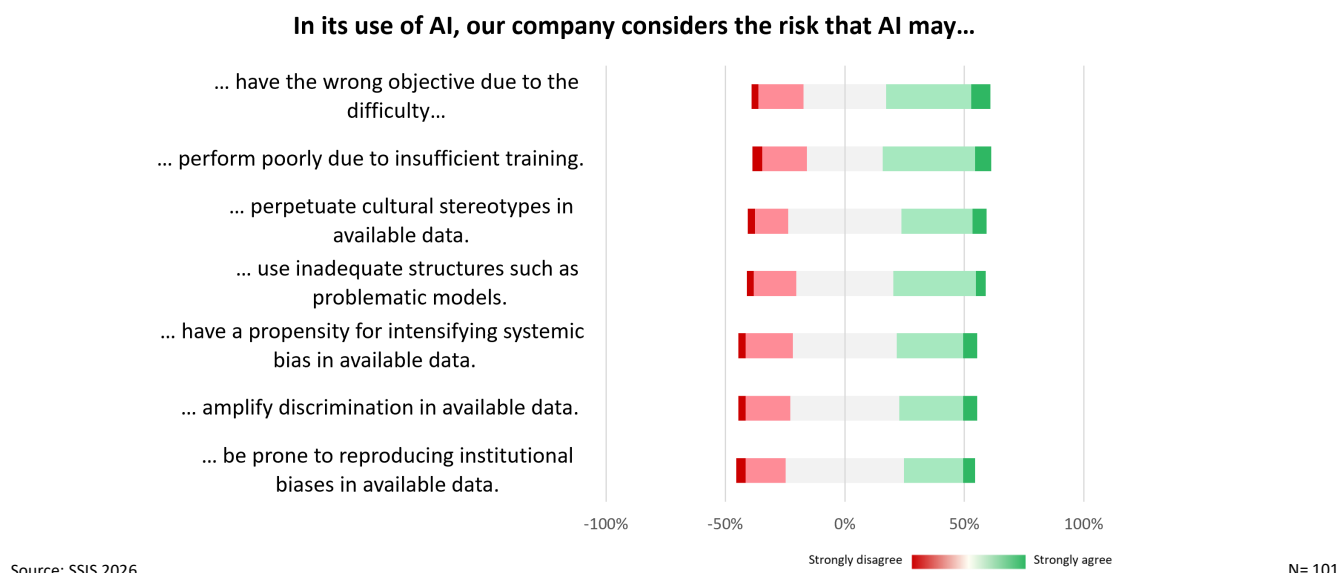
AI Use May Affect Learning and Development

The results show a mixed picture of the perceived opportunities and risks of AI use for employees (see Figure 41). While companies recognize positive effects on employees' learning ability and career development, concerns remain regarding a potential loss of control over personal development and reduced learning from employees' own experiences.

Overall, AI use is therefore associated with both opportunities and challenges for employee development. The perceived risks of AI use are shown in Figure 42. Companies particularly see potential challenges regarding the difficulty of specifying the objective explicitly and poor performance due to insufficient training.

Opportunities and Risks of AI Use: Risks

Figure 42: Risks of AI use for employee learning and development

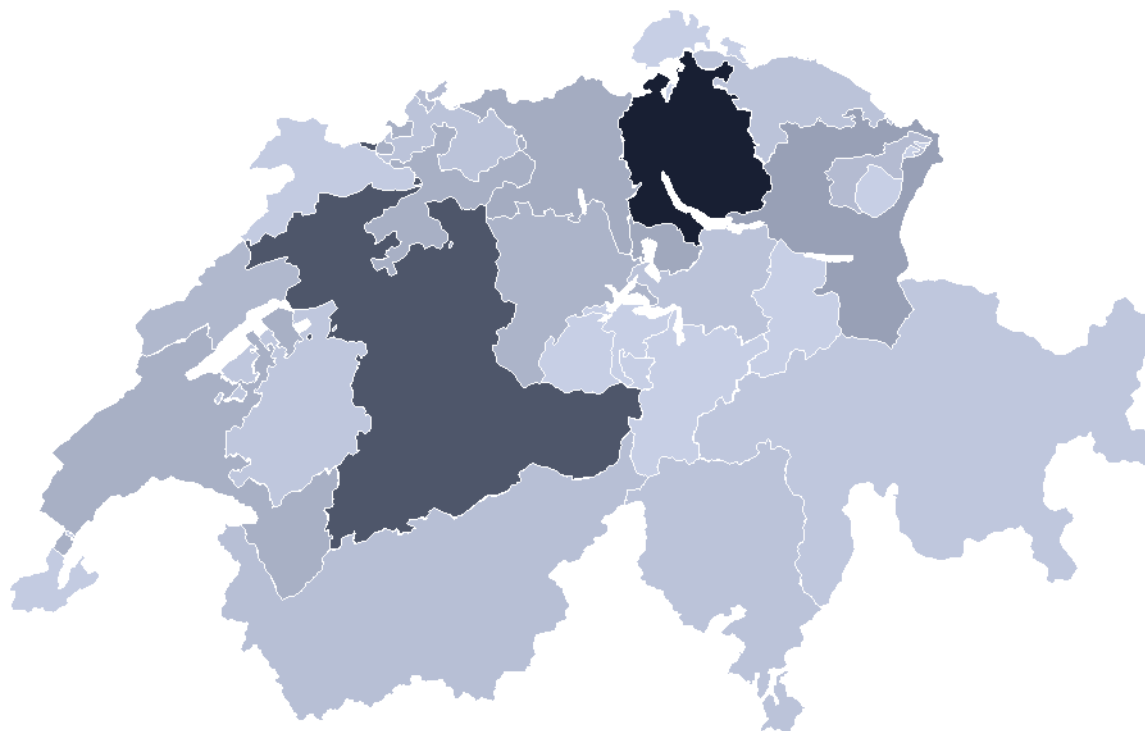


Method and Official Statistics

About the SSIS

Geographical Distribution of the Participants in 2026

Figure 43: Participating companies per canton



Source: SSIS 2026

N = 114

About the SSIS in 2026

This year we conducted the Swiss Software Industry Survey for the eleventh time. With the eleventh iteration, the SSIS managed to defend its pole position in terms of size, geographical reach, and methodological rigor:

Reach of the survey: The Swiss Software Industry Survey aims to represent the entire Swiss software industry—rather than only a couple of large companies. Therefore, the SSIS...

- ...builds on an extended and refined high-quality contact database with approximately 4'500 validated Swiss software companies
- ... and covers all Swiss language regions

Rigor of the survey: To meet highest research standards...

- ...we build on established constructs and apply state-of-the-art procedures to ensure their validity and reliability. ...we relied on the extrapolation method, which builds on state-of-the-art econometrical procedures (post-stratification by region, sub-industries, company size, and revenue)

Additional benefits for participating companies: All participants of the survey can compare their own performance against other companies using our **benchmarking website**. In addition, companies which participate regularly can now benchmark their performance over time (www.softwareindustrysurvey.ch).

Official Statistics - Employees and Added Value

Table 1: Distribution of added value in 2024 and distribution of full-time equivalents in 2025 by industry

Sections	Added Value	FTE
Mining and quarrying	0.09%	0.15%
Manufacturing	19.51%	17.92%
Energy supply, water supply, waste management	2.01%	1.75%
Construction	4.58%	12.41%
Trade; repair of motor vehicles and motorcycles	14.99%	11.59%
Transportation, storage, information and communication	5.15%	8.38%
Accommodation and food service activities	1.83%	4.45%
IT and other information services	3.45%	3.73%
Financial service activities	4.62%	2.63%
Insurance	4.03%	0.91%
Real estate activities, professional, scientific, technical and administrative activities	18.48%	18.20%
Public administration	6.55 %	3.94%
Education	4.24%	4.25%
Human health and social work activities	7.46%	6.64%
Arts, entertainment, recreation and other services	2.20%	3.02%

Source: BESTA , Added Value 2023, FTEs 2024

The SSIS as Complement to Official Statistics

Data about the Swiss software industry is provided as part of official statistics nested in the broad categories of “Computer programming, consultancy and related activities” and “Information service activities” (NOGA codes 62 & 63).

The data on added value (i.e., revenue) and FTEs (i.e., number of full time equivalents) provided by the Federal Statistical Office emphasize the major importance of the local Information Technology and Information Services sector. With more than 20 billion Swiss francs it adds 3.5% to the Swiss GDP (see Table 1) and employs 3.73% of all jobholders in Switzerland, and is one of the strongest growing sectors.

These official statistics provide reliable information about the size and growth of the IT sector. Yet, they do not draw a detailed picture about the software industry.

Therefore, the SSIS positions itself as a complementary study that enriches official statistics. Compatibility with official statistics is ensured by focusing on two NOGA codes (62, 63). Yet, we provide a richer picture of what is going on within these codes. Specifically, the report enables the following additional insights:

- ◆ Trend analysis of key performance indicators incl. EBIT, EBITDA, R&D expenditure, employee growth, and revenue growth
- ◆ Indicators on profitability
- ◆ Analyses along practically relevant categories (standard vs. custom software, maintenance vs. testing, etc.).