SSIS
Swiss Software Industry Survey

UNIVERSITÄT BERN

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October 2025

Swiss Software Industry Survey 2025

Current State, Emerging Trends, and Long-term Developments

A Study of the University of Bern on behalf of SWICO

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Bern, October 2025

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Preface

The world of work is changing in various industries—more and more traditional work structures and organizational methods are substituted by newer, more modern structures. Also the Swiss software industry is affected by this development.
What is the current state of software companies in this changing world of work? The 11th edition of the Swiss Software Industry Survey (SSIS) addresses this question.
However, the SSIS Report 2025 does not solely focus on the changing world of work. As the most comprehensive study of its kind in Switzerland, it once again offers an in-depth overview of the current state, emerging trends, and long-term developments in the Swiss software industry.

This year, the SSIS was conducted for the fifth time under the patronage of Swico, the industry association for digital Switzerland. This patronage ensures the future of the SSIS for the years to come. Besides, it enables us to be as close as possible to the Swiss ICT industry.
In this regard, we would like to thank Swico and its Interest Group “Software, Services, and Consulting” for the trust they have placed in us and we are looking forward to working with them in the years to come. As in previous years, we would also like to thank our partners sieber&partners, tranengineering and the Institute for Business Studies Basel (IWSB) as important supporters of the SSIS.

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

Yours sincerely,

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Swiss Software Industry Survey 2025

Executive Summary

Overall, the Swiss software industry is facing increasing pressure and shows less confidence heading into 2025. Profit margins have come under strain, declining from 9.1% in 2023 to 6.4% in 2024. Revenue growth expectations for 2025 and 2026 are also more subdued. In terms of employment, companies anticipate a largely stagnant development over the coming years. Additionally, the Swiss software industry generated 11.1% of its total revenue abroad in 2024 - an increase of 3.6 percentage points compared to 2023.

High Commitment to Employee Training

Employee skills appear to be a key priority in the Swiss software industry. Many companies offer both internal and external training programs, and employees often have access to dedicated time and financial budgets for professional development. However, there are notable differences in how formally these training initiatives are structured. Larger companies tend to have more formalized training programs, while smaller firms generally take a more informal approach.

High Degree of Employee Autonomy

Swiss software companies grant their employees a high degree of autonomy in how they organize their work and make related decisions. Employees also enjoy considerable flexibility in choosing their place of work. Overall, employees in about half of the companies can work from home for at least 50% of their working hours. The extent of remote work varies by role: software developers benefit from the highest flexibility, with 58.5% of companies allowing them to work remotely at least half of the time. Among employees in non-customer-related roles, 54.2% can do so, while the share is lower for customer-facing functions (41.4%). Home office arrangements are usually defined at the organizational level (59.2%), sometimes individually (53.6%), and less frequently at the team level (43.2%).

Preference of People-Oriented Culture

The Swiss software industry is characterized by a strong emphasis on a supportive, people-oriented culture. Most companies foster a family-like atmosphere and value close interpersonal relationships over formal hierarchies and administrative leadership. Organizational structures tend to be flat and decentralized, with decision-making authority broadly distributed across different levels. Business units often enjoy a high degree of autonomy, and innovations are frequently initiated from the bottom up rather than driven solely by top management.

Increasing Use of AI and Freedom in Tool Choice

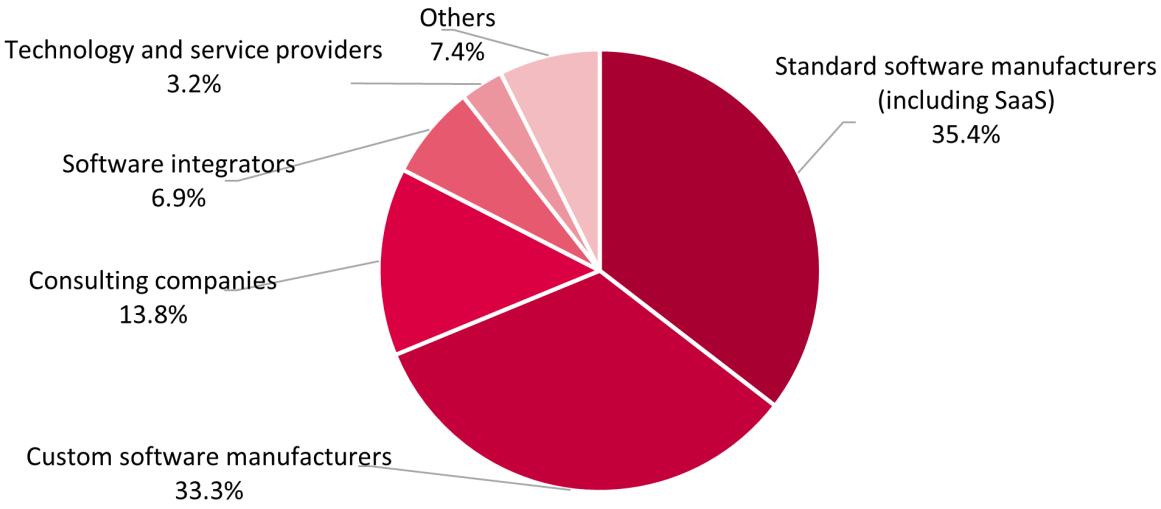
AI is rapidly gaining importance in the Swiss software industry: 81.4% of companies reported using AI in software development in 2025, up from 46.8% in 2024. Employees retain considerable freedom in selecting tools, especially AI tools, as most companies remain in an experimental phase without strict usage guidelines. Over half (52.5%) of the companies allow employees to decide which AI tools to use. By contrast, freedom is more limited for established IT tools, where standards are well-defined - 36.9% of companies permit individual choice, while 37.5% do not. Non-customer-oriented roles generally enjoy greater flexibility than customer-facing ones.

Spotlight on

Revenue, Profitability & Future Growth

Participating Companies

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



Source: SSIS 2025

N = 189

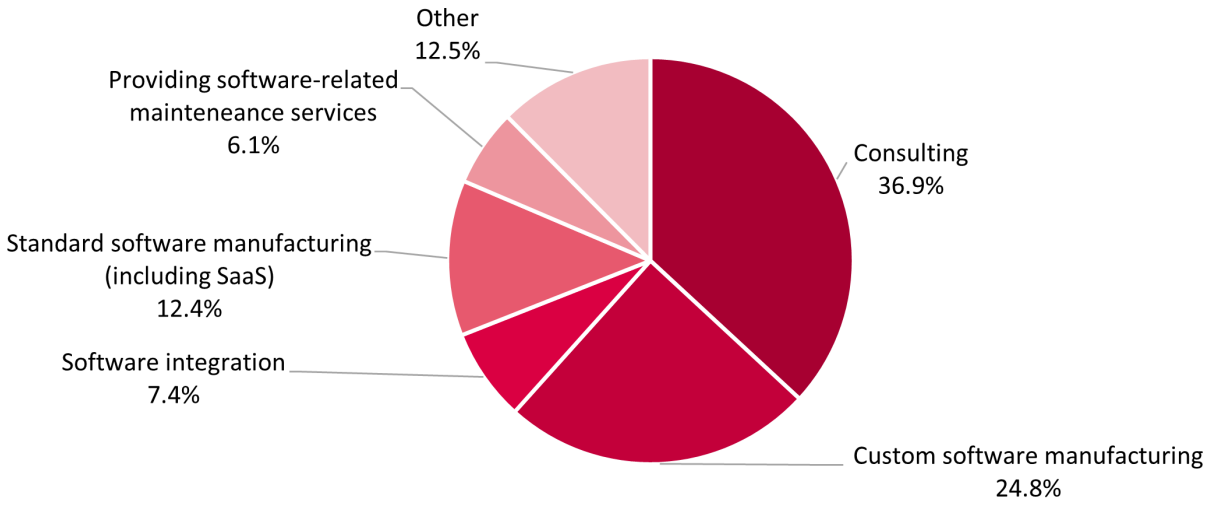
Software-Related Consulting Still as Main Source of Revenue

The distribution of companies participating in the SSIS 2025 is presented in Figure 1. Similar to previous years, the sample is dominated by manufacturers of standard software (35.4%) and custom software (33.3%). Our sample also includes companies in the following sectors: Consulting companies (13.8%), software integrators (6.9%), and technology and service providers (3.2%).

Figure 2 shows the weighted revenues by activity, indicating that software-related consulting is the largest source of revenue at 36.9%, followed by custom software manufacturing at 24.8%. Standard software manufacturing accounts for 12.4%, while software integration contributes 7.4%. Providing software-related maintenance represents 6.1% of total revenue, and other activities make up the remaining 12.5%.

Revenues by Activity

Figure 2: Revenues of Swiss software companies by activity

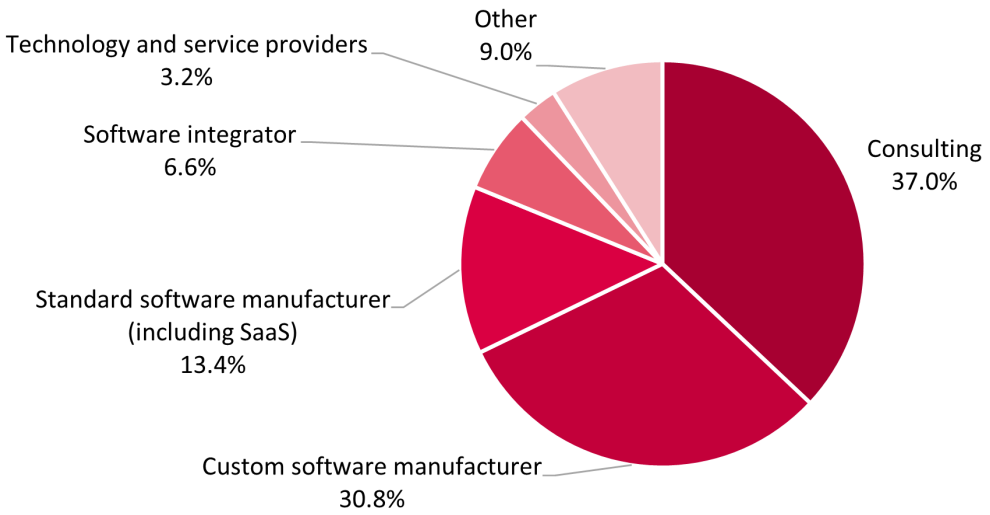


Source: SSIS 2025

N = 106

Number of Employees

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



Source: SSIS 2025

N = 171

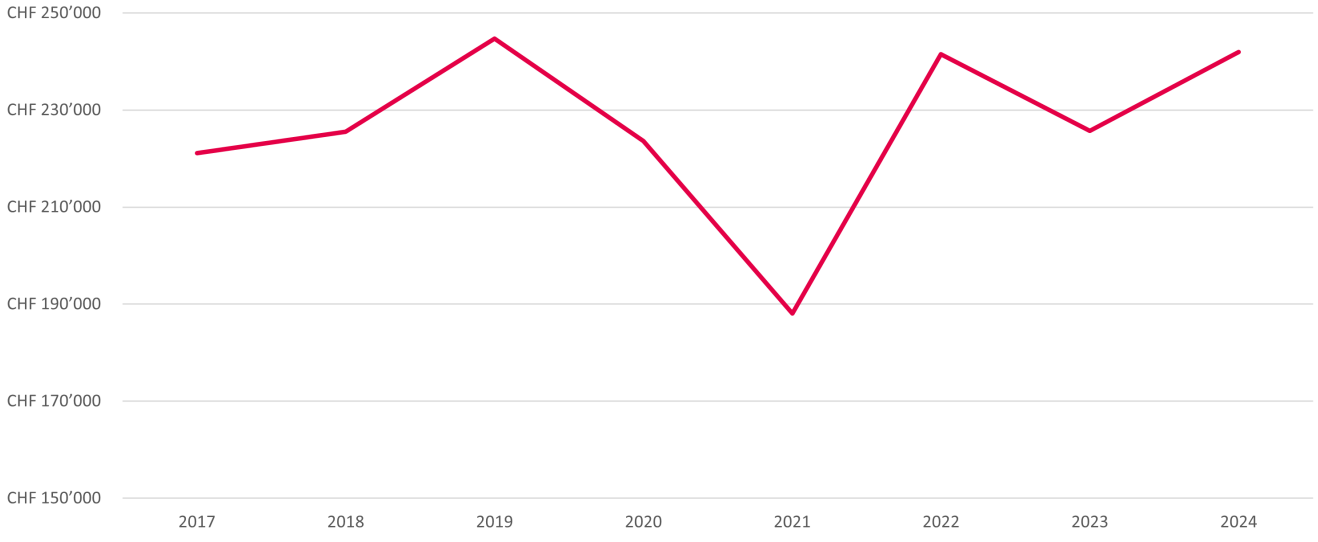
Revenue per Employee Back to Pre-COVID Level

Overall, he majority of employees work in the areas of consulting (37.0%), custom software manufacturing (30.8%), and standard software manufacturing (13.4%) (see Figure 3). These three sub-industries account for about 80% of employment in the software industry.

Regarding the development of revenue per employee, the values have returned to levels similar to those observed before the COVID-19 pandemic. As illustrated in Figure 4, after a period of growth starting in 2021, the values show a slight decline in 2023, followed by an increase again in 2024.

Revenue per Employee

Figure 4: Development of revenue per employee since 2017

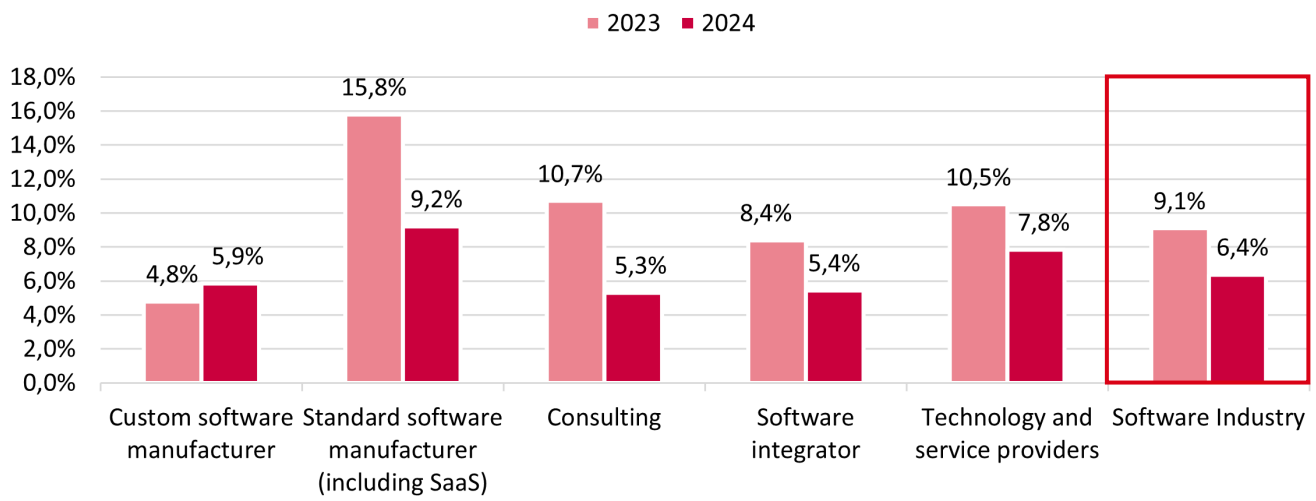


Source: SSIS 2025

N = 98

EBIT Margins

Figure 5: EBIT margins by sub-industries in 2023 and 2024



Source: SSIS 2025

N = 83

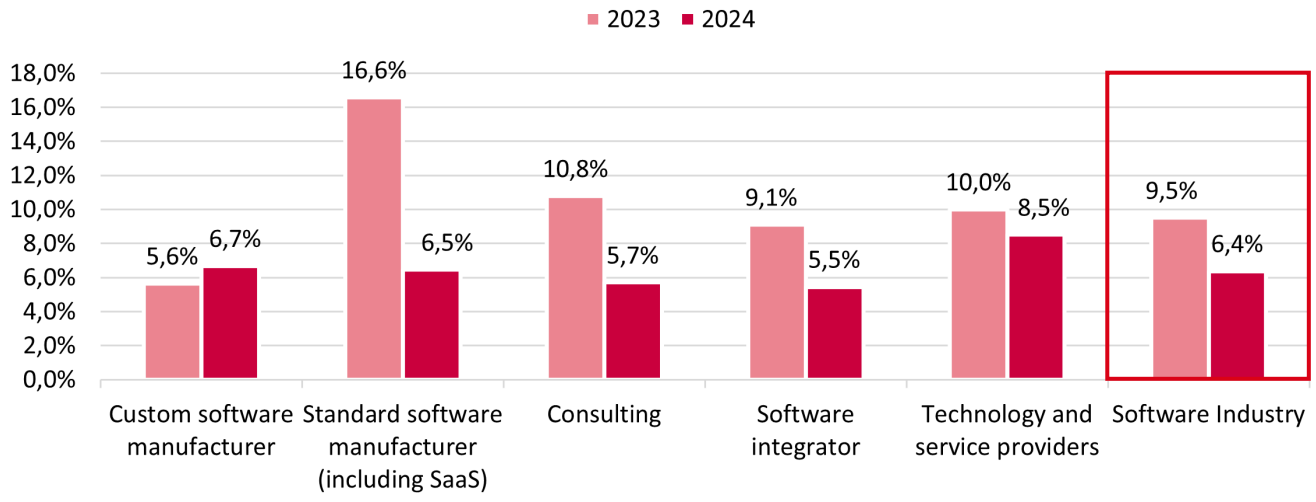
EBIT and EBITDA Margins Show Downward Trend

Figure 5 shows the EBIT margins of the sub-industries, revealing an industry-wide decrease from 9.1% to 6.4%. This downward trend is evident among standard software manufacturers (9.2%), technology and service providers (7.8%), software integrators (5.4%), and consulting companies (5.3%). In contrast, an increase in EBIT margins is observed for the custom software manufacturing sub-industry (5.9%).

Figure 6 illustrates the EBITDA margins of the Swiss software industry with an industry-wide decrease from 9.5% to 6.4% in 2024. This trend applies to standard software manufacturers (-10.1%), consulting firms (-5.1%), software integrators (-3.6%), and technology and service providers (-1.5%), while the EBITDA margins for custom software manufacturers (+1.1%) went up.

EBITDA Margins

Figure 6: EBITDA margins by sub-industries in 2023 and 2024

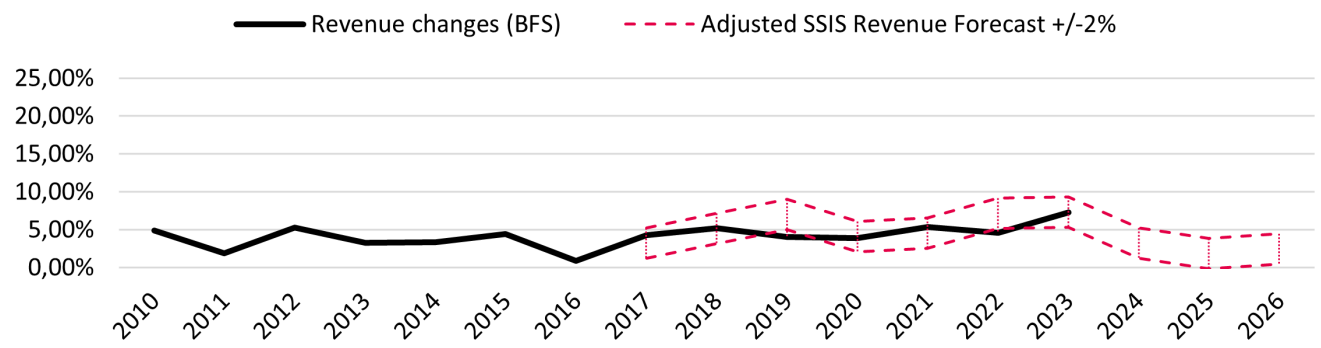


Source: SSIS 2025

N = 83

Revenue Growth Forecast

Figure 7: Expected year-over-year revenue growth



Source: SSIS 2025

N = 93

Revenue Expected to Grow Compared to Previous Years

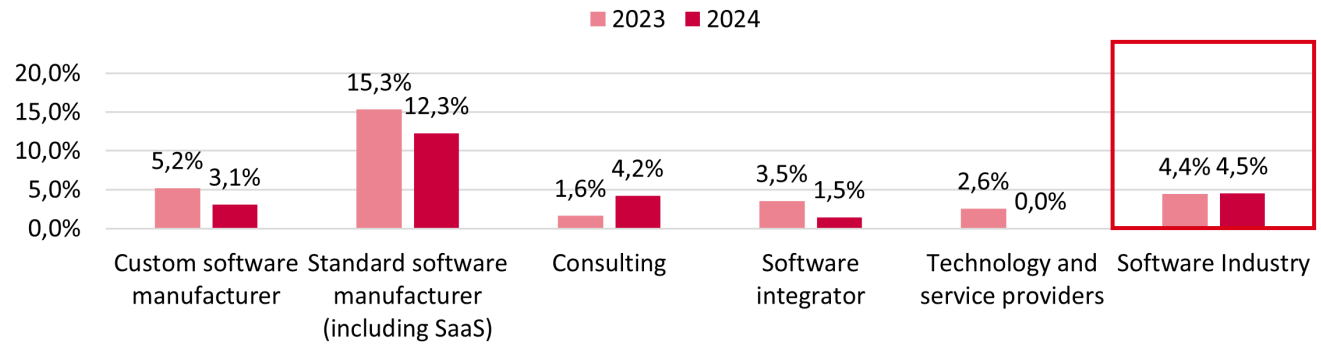
The projected revenue growth of the Swiss software industry represented as a target range with a margin of ± 2 %, is illustrated in Figure 7. According to revised projections, the Swiss software industry is anticipated to have a revenue growth of 1.83% in 2025 and 2.46% in 2026.

The corridor has been corrected 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 2023 and 2024 as percentage of revenue



Source: SSIS 2025

N = 83

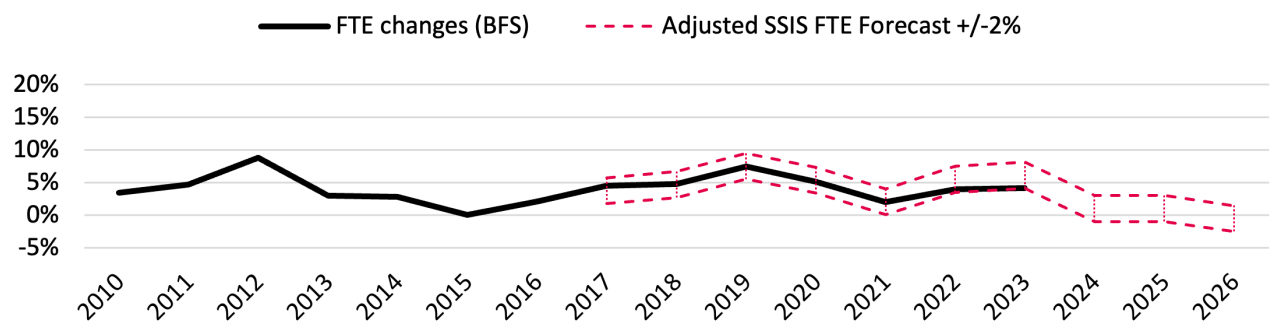
Stable Trend in Research and Development Investments

Figure 8 presents the research and development (R&D) spending by Swiss software companies as a percentage of revenue in the year 2024 compared to the year 2023.

Overall, Swiss software companies invest a slightly higher proportion (4.5%) of their revenue in R&D in 2024 (compared to 4.4% in 2023). Investments decrease for standard software manufacturers (-3.0%), technology and service providers (-2.6%), custom software manufacturers (-2.1%), and software integrators (-2.0%). However for consulting firms (+2.6%) expenditures in research and development increased in 2024 compared to 2023.

Employee Growth Forecast

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



Source: SSIS 2025

N = 177

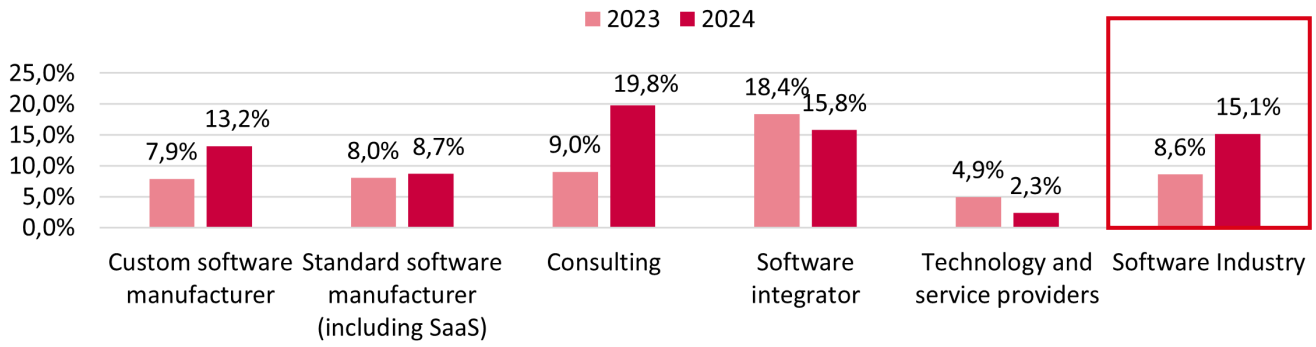
Lower Employee Growth Forecast

Figure 9 depicts the anticipated growth in the number of full-time equivalents (FTEs) in the Swiss software industry, represented as a target range with a margin of ± 2%. Based on the adjusted expectations (by the deviation from the official BFS statistics), the number of FTEs in the Swiss software industry is expected to increase by 1.07% in 2025 and slightly decrease by 0.48% in 2026, respectively.

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 2023 and 2024 using the basic formula



Source: SSIS 2025

N = 165

Increasing Employee Fluctuation

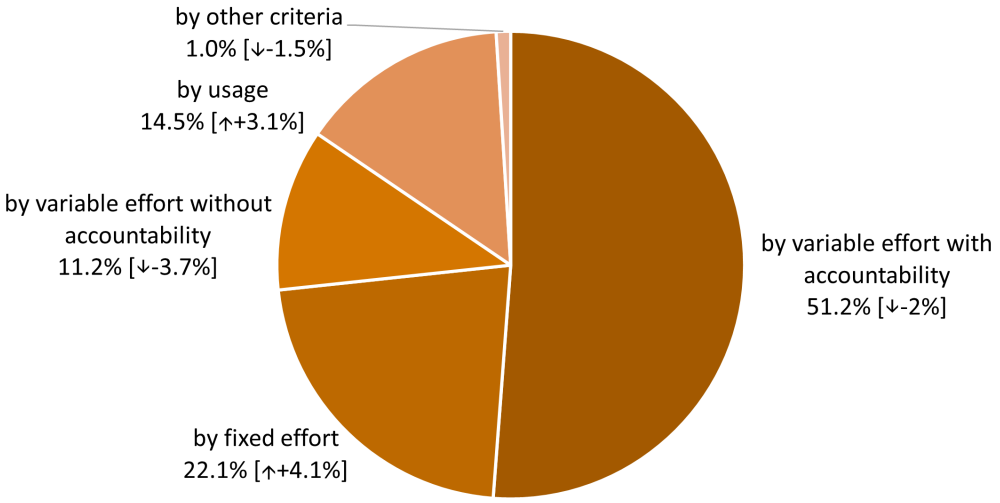
Figure 10 shows the employee fluctuation in the Swiss software industry using the basic formula [(exits / headcount at the beginning of a period) * 100]. Based on the results of the calculations, consulting companies experienced the highest fluctuation in 2024 (19.8%). The fluctuation was slightly lower among software integrators (15.8%), custom software manufacturing (13.2%), standard software manufacturing (8.7%), and technology and service providers (2.3%). Overall, the employee fluctuation rate across the entire sector increased from 8.6% to 15.1%.

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 2024]



Source: SSIS 2025

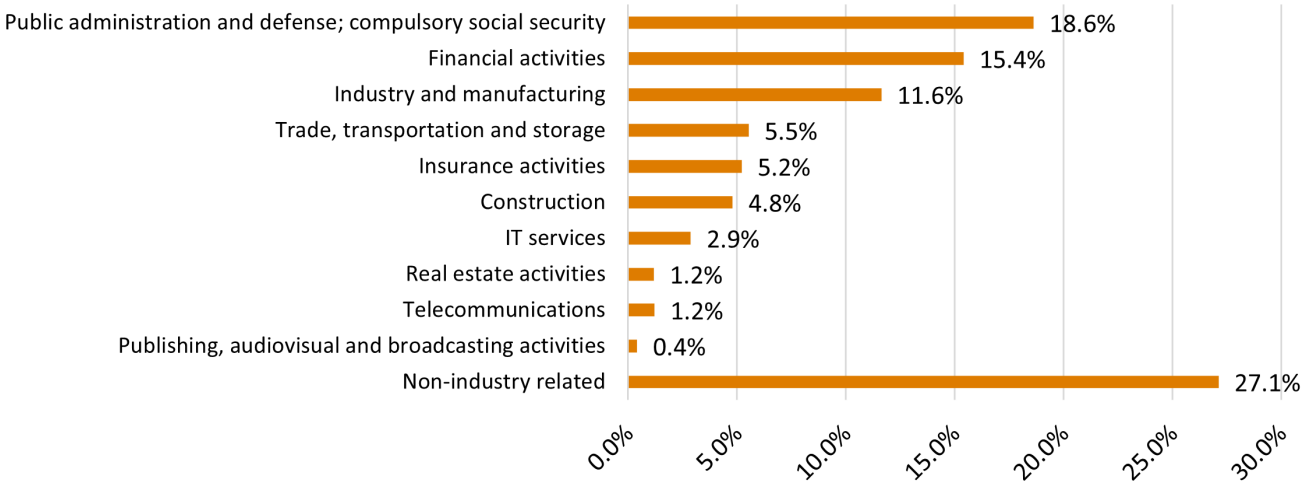
N = 106

IT Services Industry: A Key Revenue Segment

Figure 11 highlights the main billing models in the Swiss software industry. Most revenue came from variable effort with accountability (51.2%), followed by fixed effort billing (22.1%) and variable effort without accountability (11.2%). Usage-based (14.5%) and other criteria-based (1.0%) had smaller contributions to total revenue. Figure 12 illustrates the primary client industries for the Swiss software sector based on the revenue generated in each industry this year. From the key industry categories, public administration revenues account for 18.6% of total revenues and financial activities ranks for 15.4%. Revenues that do not fall in any of the categories contribute 27.1% of total revenues.

Revenue per Industry

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

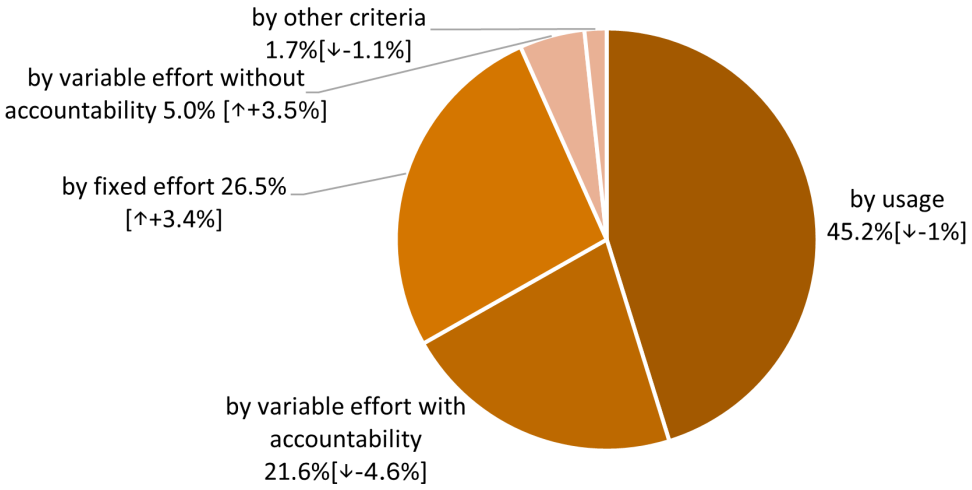


Source: SSIS 2025

N = 106

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 2024]



Source: SSIS 2025

N = 34

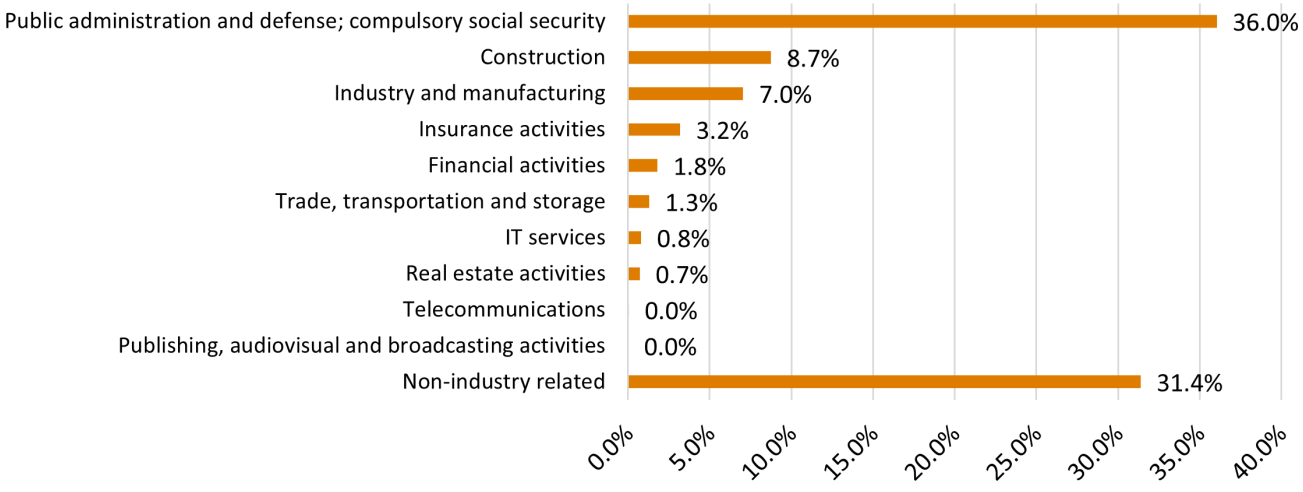
For Standard Software: Usage-Based Billing Models Still in the Lead

Usage-based billing is the most important model for standard software manufacturers, making up 45.2% (see Figure 13). This aligns with the growing importance of cloud solutions. Billing based on variable effort with accountability remains crucial, contributing 21.6%, while the remaining third is split among all other billing models.

The public sector represents the largest client industry for standard software manufacturers, making up 36.0% of total revenues (see Figure 14). Non-industry related activities come in second place at 31.4%. The other industries only follow with some distance, with for example, construction contributing with 8.7%.

Revenue per Industry for Standard Software Manufacturers

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

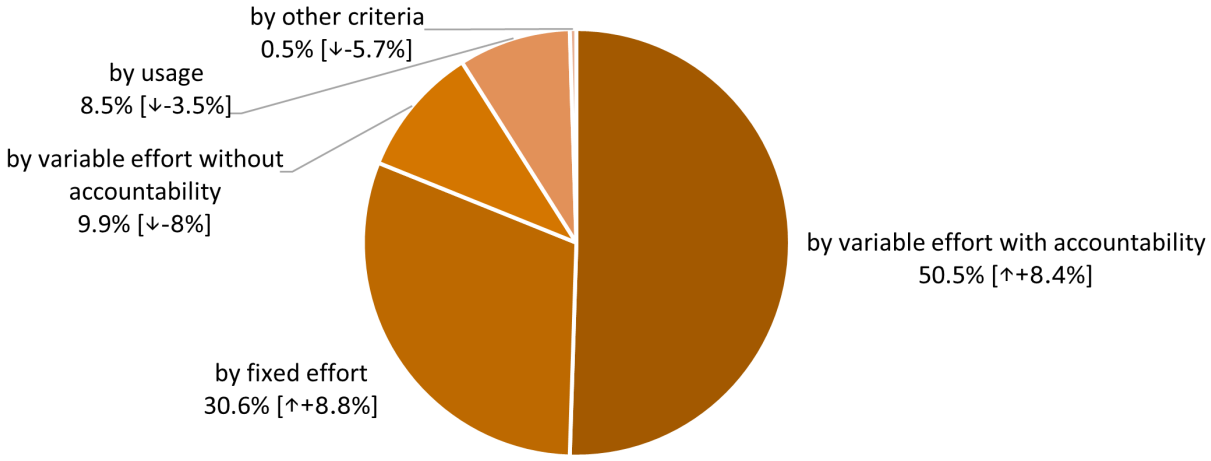


Source: SSIS 2025

N = 34

Billing Models of Custom Software Manufacturers

Figure 15: Billing models of custom software manufacturers as a percentage of the sub-industry revenue [compared to SSIS 2024]



Source: SSIS 2025

N = 40

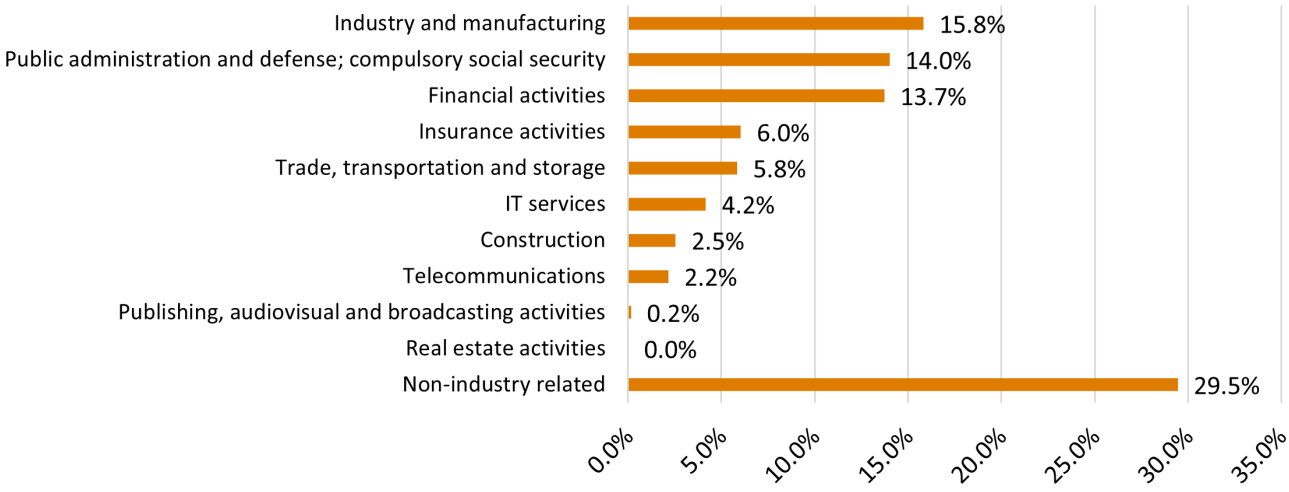
For Custom Software: High Importance of Variable Effort

The leading billing model for custom software manufacturers, as shown in Figure 15, is variable effort with accountability, contributing 50.5% of total revenues. Billing based on fixed effort (30.6%) and variable effort without accountability (9.9%) are also major contributors. Other billing models contribute only marginally.

Figure 16 shows the most important industries for custom software manufacturers. At 15.8%, the sector, including industry and manufacturing activities, is a major client for custom software manufacturers, followed by public administration (14.0%). However, the largest portion, 29.5%, is not attributed to any specific industry.

Revenue per Industry for Custom Software Manufacturer

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

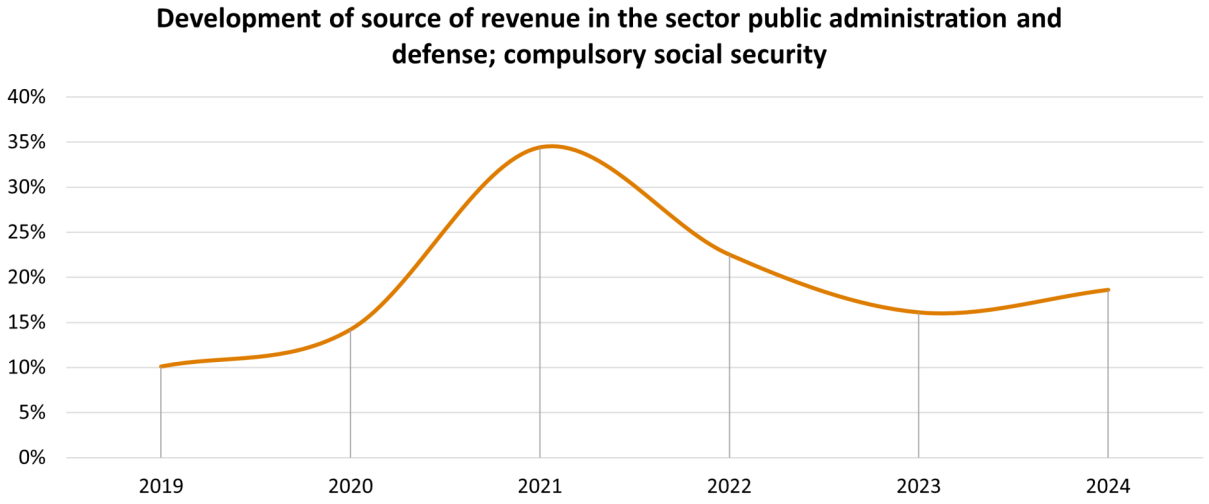


Source: SSIS 2025

N = 40

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 2025

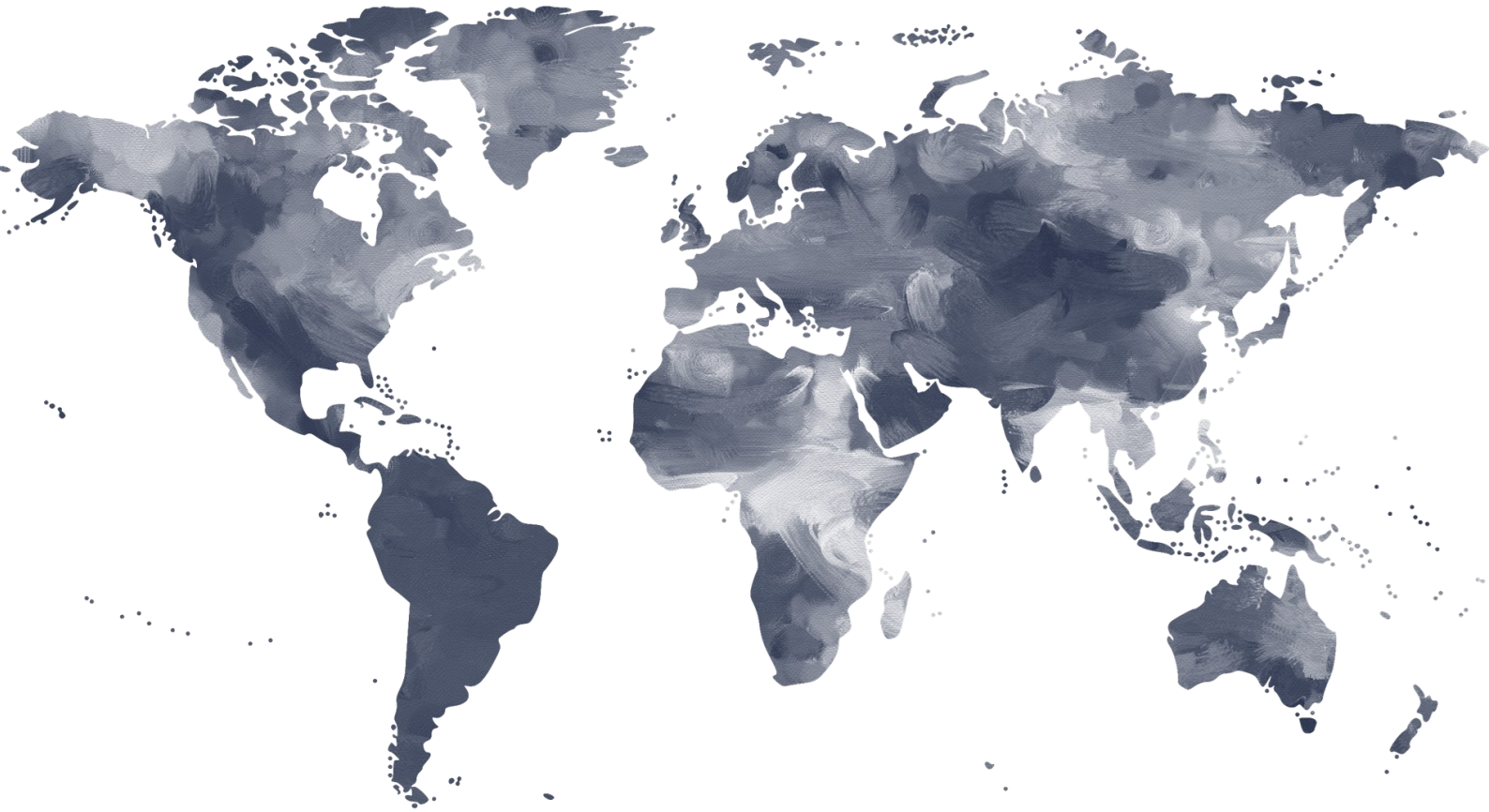
Development of Public Administration as Revenue Segment

Figure 17 highlights the development of the share of the revenue segment public administration and defense (compulsory social security) in the Swiss software industry over time. For this illustration, the revenue shares of the last five years according to previous Swiss software industry surveys are considered.

A growth of the share and therefore and increase of the importance of the public sector in the Swiss software industry is noticeable. With a peak in the year 2021, the sector depicts a growth overall over five years. However, the numbers have to be considered carefully, as the participants of previous Swiss software industries did not consist of the same panel of participants.

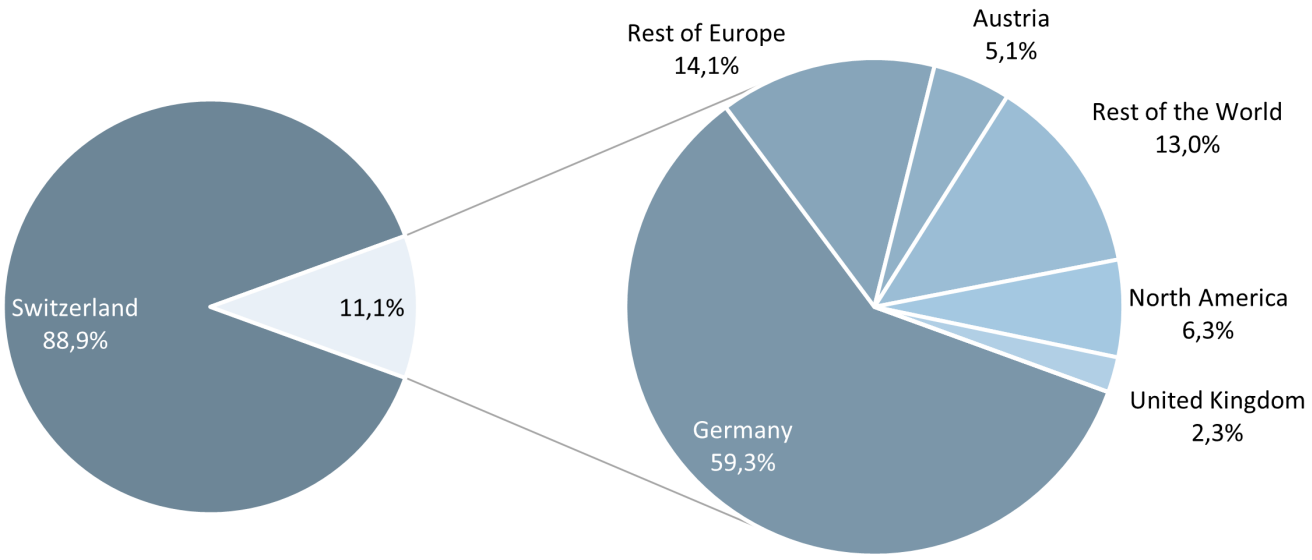
Spotlight on

Internationalization & Sourcing



Degree of Internationalization and Target Markets

Figure 18: Distribution of international revenue



Source: SSIS 2025

N = 105

The Swiss software industry generated

11.1%

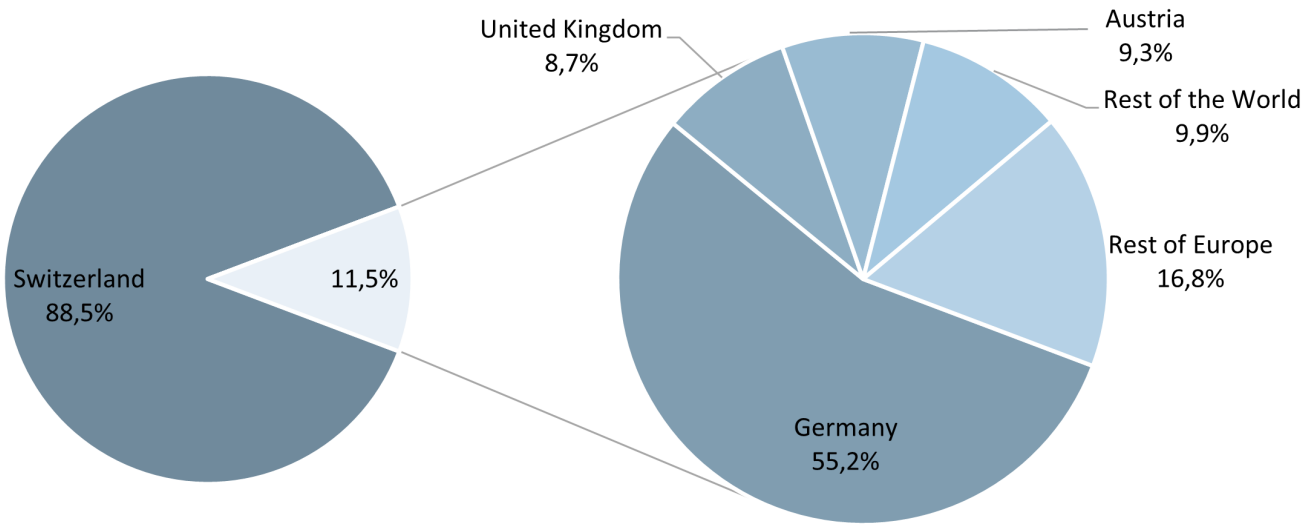
of its revenue outside Switzerland

More Revenue From International Markets

Figure 18 illustrates the distribution of revenue generated by the Swiss software industry in 2024, showing how it is divided between domestic and international markets. The share of international revenue has increased from 7.5% to 11.1%. As in previous years, Germany remains the most important export market, accounting for 59.3% of revenues generated abroad. The rest of Europe ranks second with 14.1%, including countries such as Italy, France, and others. Smaller shares of revenue were generated in Austria (5.1%), North America (6.3%), and the United Kingdom (2.3%).

Degree of Internationalization and Target Markets of Standard Software Manufacturers

Figure 19: Distribution of international revenue of standard software manufacturers



Source: SSIS 2025

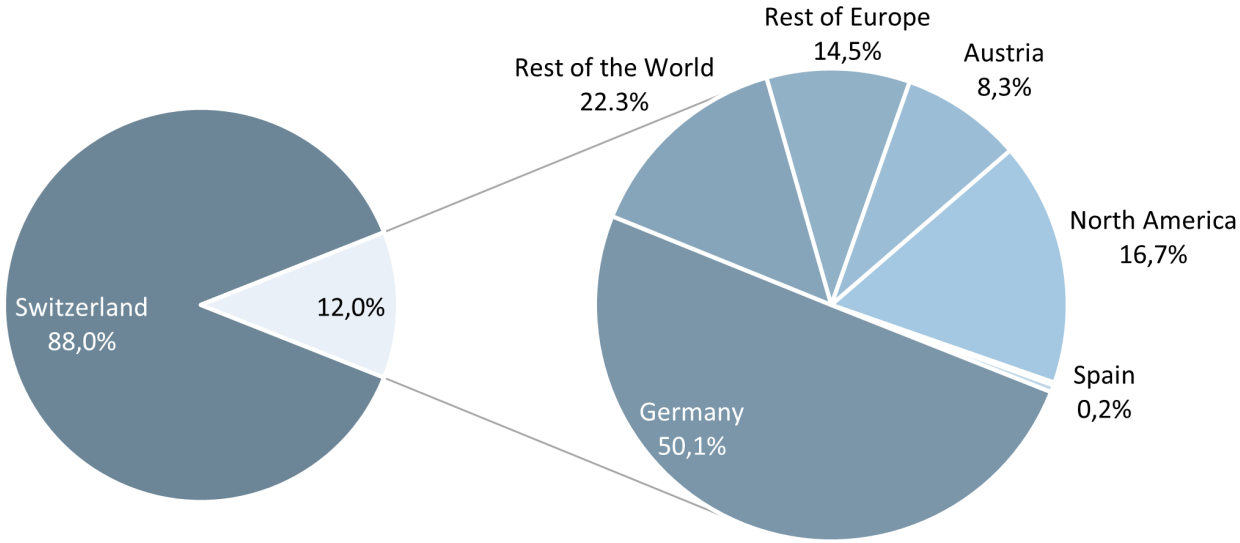
N = 105

International Revenue of Standard and Custom Software Manufacturers

In 2024, standard software manufacturers generated 11.5% of their total revenue from international markets (see Figure 19). Germany accounted for the largest share, contributing 55.2% of the foreign revenue. Austria followed with 9.3%, while the United Kingdom made up 8.7%. Other European countries represented a combined 16.8%, and markets outside Europe accounted for the remaining 9.9%. As shown in Figure 20, custom software manufacturers earned 12.0% of their total revenue from international markets. Germany accounted for 50.1% of this, followed by North America with 16.7%, the rest of the World with 14.5%, Austria with 8.3%, and Spain with 0.2%.

Degree of Internationalization and Target Markets of Custom Software Manufacturers

Figure 20: Distribution of international revenue of standard custom manufacturers

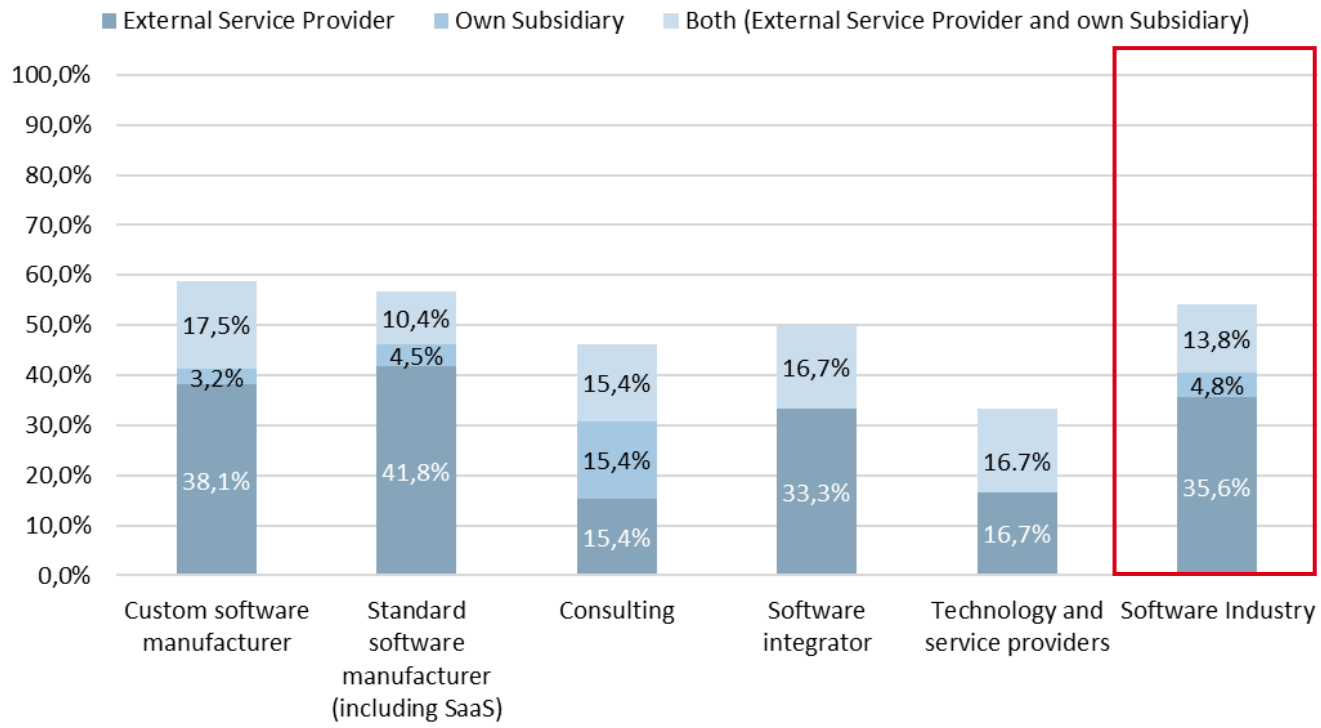


Source: SSIS 2025

N = 40

Outsourcing and Subsidiaries

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



Source: SSIS 2025

N = 188

Among Swiss software companies

54.3%

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 shows the propensity of Swiss software companies to contract with external service providers, use own subsidiaries or both external service providers and their own subsidiaries in 2024.

The results indicate that the propensity to outsource is highest among custom software manufacturers (58.7%), standard software manufacturers (56.7%), and software integrators (50.0%), followed by technology and service providers (50.0%) and consulting companies (46.2%). Overall, approximately 54.3% of Swiss software companies engage in sourcing activities.

41.8% of standard software manufacturers source services from external providers, followed by custom software manufacturers (38.1%), software integrators (33.3%), technology and service providers (16.7%), and consulting companies (15.4%).

By contrast, sourcing services from their own subsidiaries is practiced primarily by consulting companies (15.4%), with lower shares among standard software manufacturers (4.5%) and custom software manufacturers (3.2%).

All sub-industries obtain services from both external service providers and their own subsidiaries, led by custom software manufacturer (17.5%).

Spotlight on

The Changing World of Work

Introduction to the Special Topic

Digital transformation and a growing awareness of employee needs and work-life balance were key factors that led to the development of new workplace models with higher flexibility and autonomy that were not imaginable before.

Increasingly, new principles are adopted in this changing world of work to reshape work processes and company culture. Also, in the software industry, this topic has found increasing interest and is expected to have great potential by positively influencing the work satisfaction and retention of software developers (Klaus et al., 2014). For example, with the implementation of core concepts like meaningfulness, autonomy, and self-leadership, the engagement and performance of employees may be enhanced (AlEssa et al., 2022; Inam et al., 2023; Panda et al., 2022). When it comes to new workplace principles, the software industry was always leading in the adoption of modern structures, with one example being the implementation of agile work structures. The question arises, as to whether also in this current time of the changing world of work with novel, modern concepts arising, software companies are still in this leading position. With the special topic of this year's Swiss software industry report, we aim to capture the current situation of Swiss software companies is in this regard. The report examines the reaction of Swiss software companies to the changing world of work.

The Structure of This Chapter

This chapter is structured as follows: First, we examine different dimensions of the changing world of work, beginning with skill development in the context of new work environments. Following, we examine to what extent employees receive possibilities to exert influence on aspects like leadership, responsibility, wage / salary increase, and performance assessment. Next, the autonomy of employees is analyzed in further detail by investigating to what extent software firms grant flexibility in working hours, task completion, and tool selection. Then, we examine the fostering of employees' meaningfulness, by focusing on culture, norms, and hierarchical structures of companies. To finalize, we conclude the chapter with the expected analysis of the impact of all these measures regarding the changing world of work on the outcome of companies.

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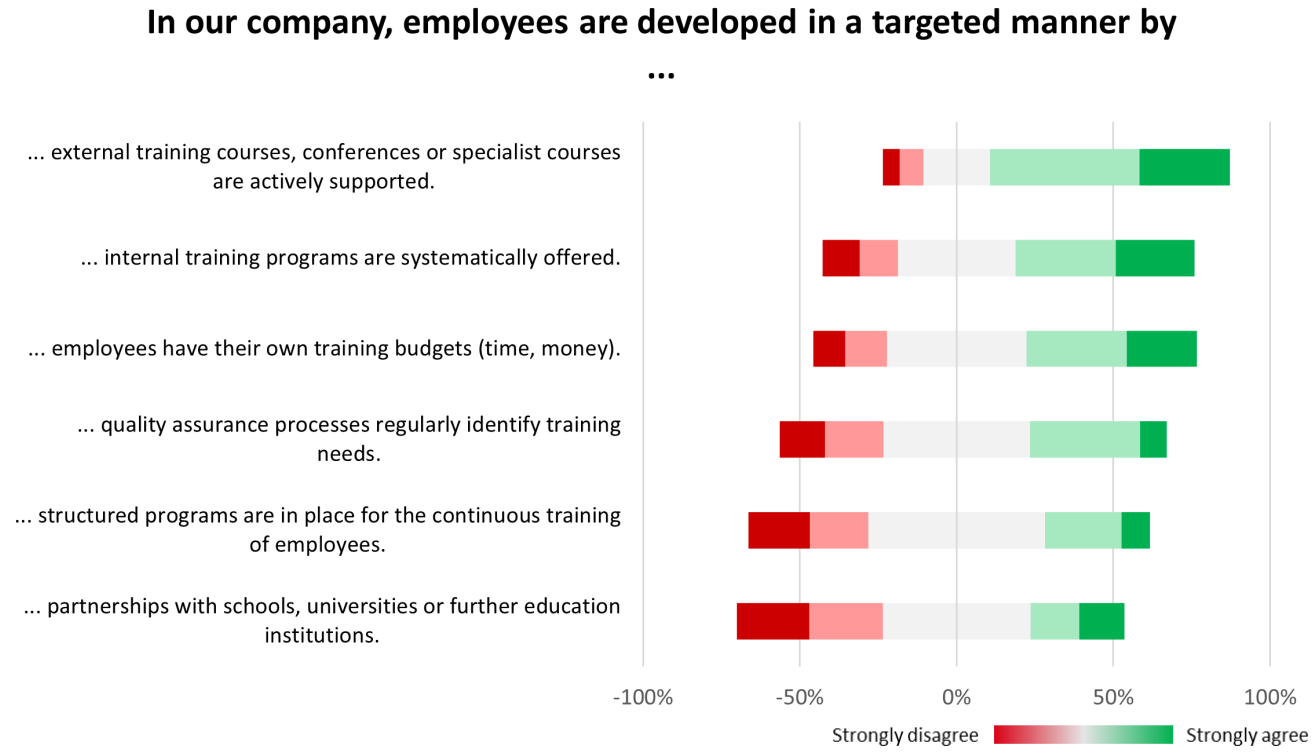
Employee Training

Figure 22: Training possibilities for employees



Source: SSIS 2025

N = 188

High Importance of Training

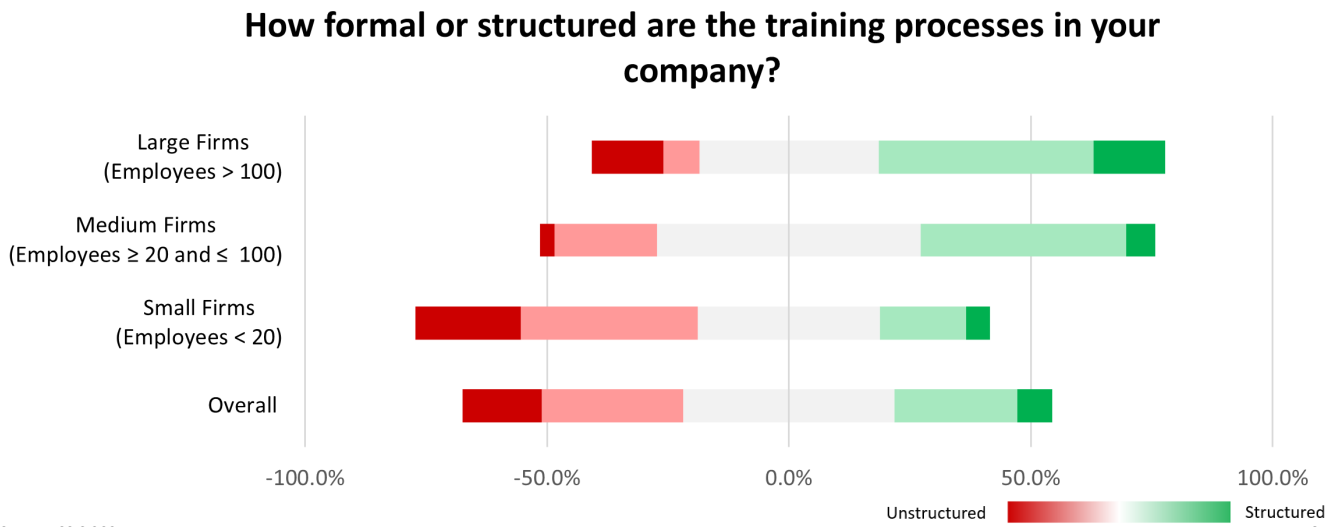
High importance is placed on employee training in the surveyed companies. In particular, external training courses, conferences and specialist courses are supported, but internal training is also common practice among companies in the Swiss software industry. In addition, it is evident that training is flexibly adapted to the individual needs of employees and is not highly structured.

Figure 22 shows how companies assess themselves in terms of employee training and skills development using a 5-point Likert scale ranging from “Strongly disagree” to “Strongly agree”.

Approximately three quarters (76.5%) of companies support external training, conferences, or specialist courses. In addition a large part of the Swiss software companies offer internal training programs (57.2%) and give their employees their own training budget either in time or money (54.2%). In order to identify training needs, some companies (43.6%) regularly carry out quality assurance processes. Structured programmes are less important. 38.3% of companies state that they tend to target employees to a lesser extent through structured programmes for continuous training. Partnerships with schools, universities and further education institutions are also less important. Approval drops to 29.9%.

Employee Training Structure

Figure 23: Structure of training processes



Source: SSIS 2025

N = 187

Training Processes Rather Unstructured

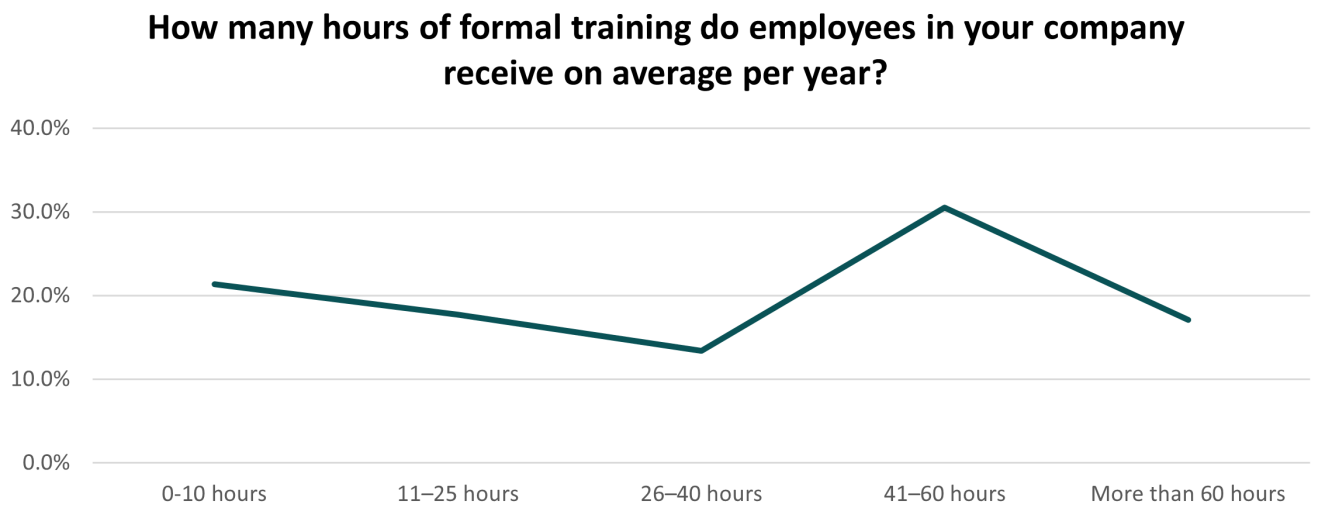
Figure 23 shows the structure of the training processes and is also broken down by company size.

The training processes in companies are mostly unstructured. 45.6% state that they are unstructured or rather unstructured, while 32.6% consider them to be structured. It is also apparent that there is a variance between company sizes, with smaller companies being less structured than larger ones.

The relevance of skills development is also reflected in the number of hours employees receive for training each year (Figure 24). There is a relatively high variance between companies in terms of how many training hours they provide to employees, with 30.5% providing 41-60 hours and 17.1% providing over 60 hours. There are also companies with a low number of formal training hours. At 21.3% of the companies surveyed, employees receive less than 10 hours of training.

Training Time

Figure 24: Time invested for employee training

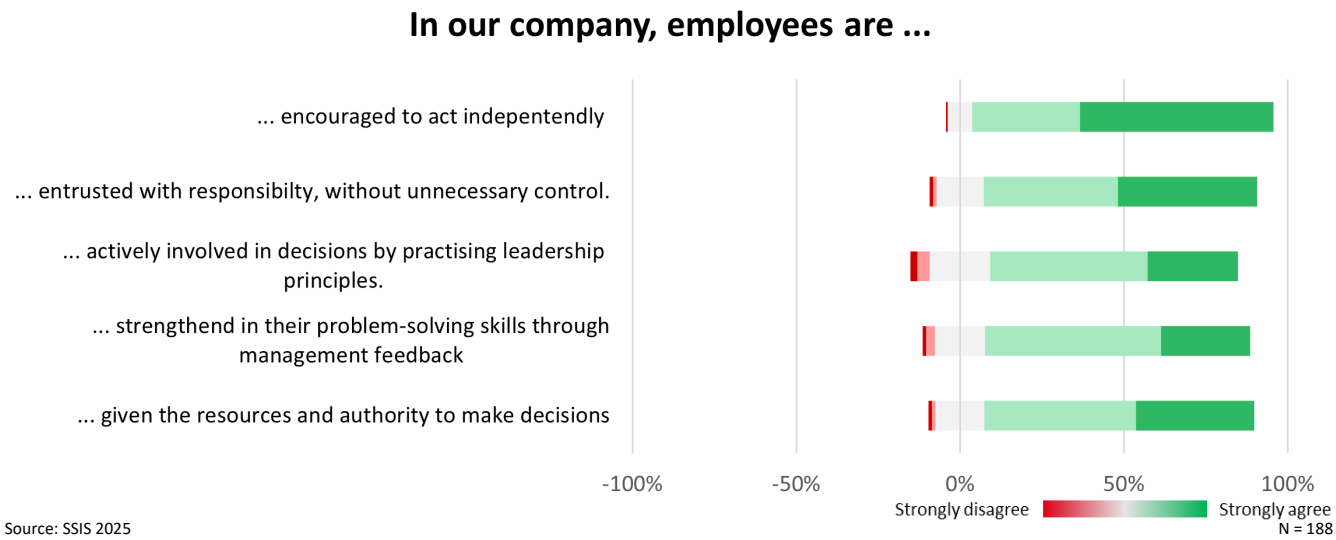


Source: SSIS 2025

N = 186

Empowering Leadership

Figure 25: Empowerment of leadership initiative and responsibility of employees



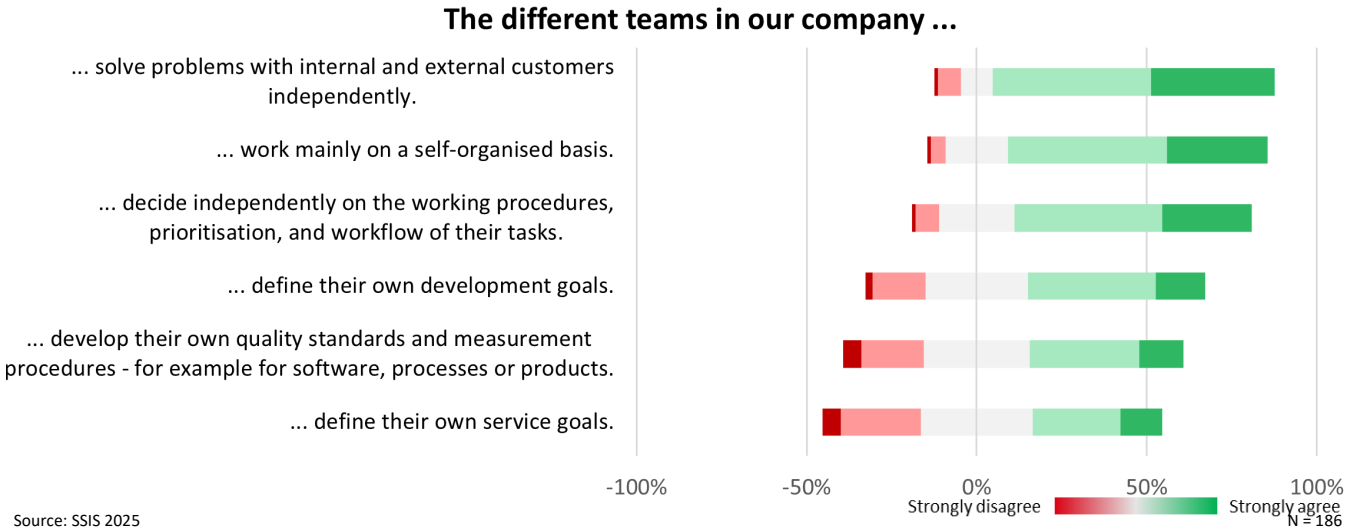
Source: SSIS 2025

A Lot of Freedom in a Defined Framework

In around 92% of our responding companies, employees are encouraged to act independently. The picture is similar for other empowering leadership factors such as entrusting employees with responsibility (83.6%), actively involving them in decisions (75.6%), strenghten them in their problem-solving skills (80.8%) and giving them authority to make decisions (82.5%) (see Figure 25). Figure 26 shows the freedom and responsibility that teams have within the company. In the companies surveyed, teams can independently solve problems with customers (82.9%) and work mainly on a self-organised basis (76.4%). While teams can operate autonomously, there is less freedom regarding service goals (38.2 %) and developing own quality standards and measurement procedures (45.2%) which are more strictly defined.

Work Design

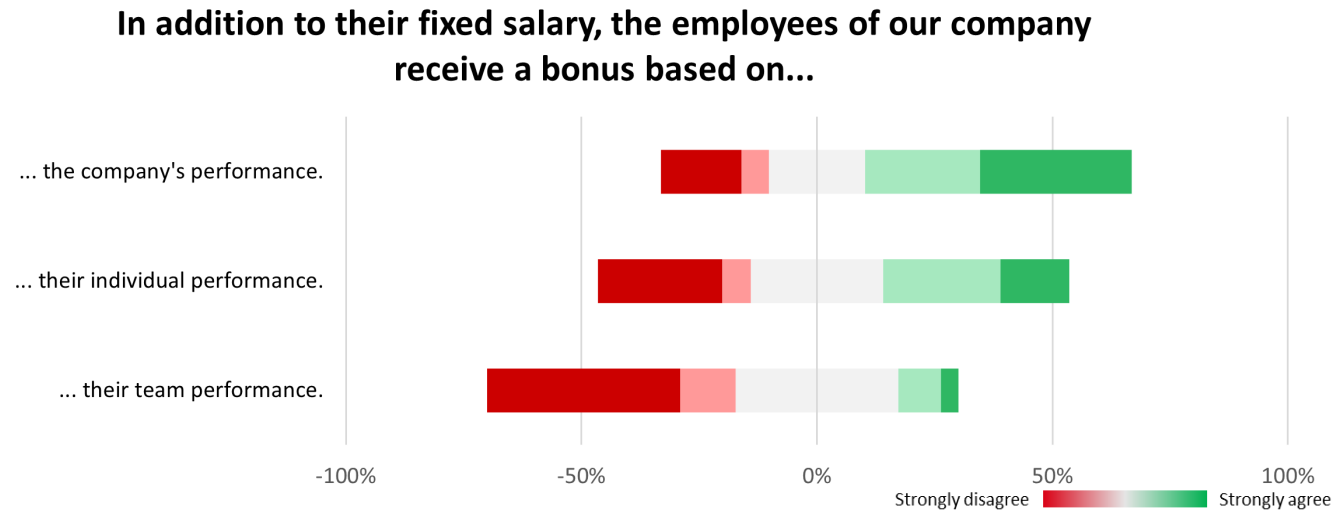
Figure 26: Role of teams in the company



Source: SSIS 2025

Compensation Based on Performance

Figure 27: Additional compensation based on performance



Source: SSIS 2025

N = 183

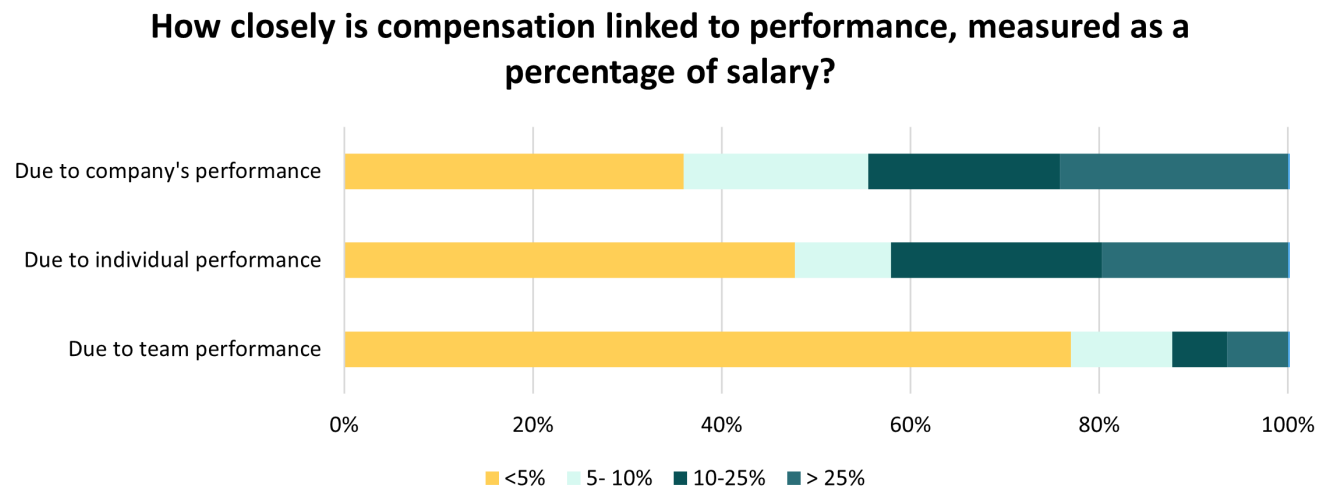
Compensation Models Still Rather Traditional

The next questions deal with financial compensation for employees. It appears that companies in the Swiss software industry are still rather traditional in their approach. There is less flexibility and more structure when it comes to salary aspects. Bonuses are often linked to company performance (56.6%), sometimes to individual performance (39.5%), but rarely to team performance (12.7%) (Figure 27).

Figure 28 shows how closely this additional bonus is linked to performance in terms of percentage of salary. A similar picture emerges, with the largest shares being linked to company performance. In the majority of companies, performance-based payment is lower than 10%. From those companies, where larger parts of the salaries are performance-based, this is mostly based on company performance, followed by individual and team performance.

Bonus Based on Performance

Figure 28: Linkage of bonus to performance



Source: SSIS 2025

N = 157

Locus of Compensation

Figure 29 : Determination of wages and salary increases

Source: SSIS 2025

N = 355

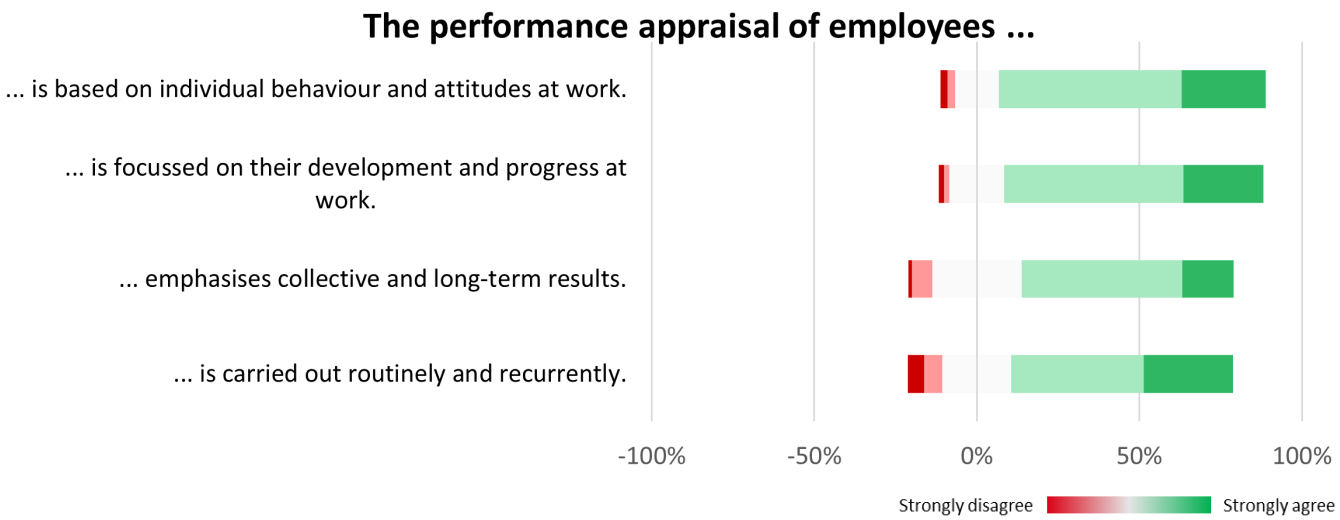
Compensation Traditonally Defined by Managers

The observed freedom of employees and general low-structured approach is, however, not present in all dimensions of companies. When it comes to who determines wages and salary increases, most companies still take a traditional approach, with decisions being made primarily by senior management.

Figure 29 highlights this aspect by illustrating which parties are involved in the determination of wage and salary increase. In a great majority of enterprises only managers are involved when it comes to decide on the wage and salary increase of an employee. Spanning over the axis toward more joint decisions being made together with the manager and the respective employee, these are less common. Even fewer occurrences are present when looking further into the direction of employee determination of wages and salary increase. Only in a few instances, employees can determine their wage and salary increase by themselves.

Performance Appraisal

Figure 30: Employee performance appraisal



Source: SSIS 2025

N = 178

Dominance of Individual Performance Appraisal

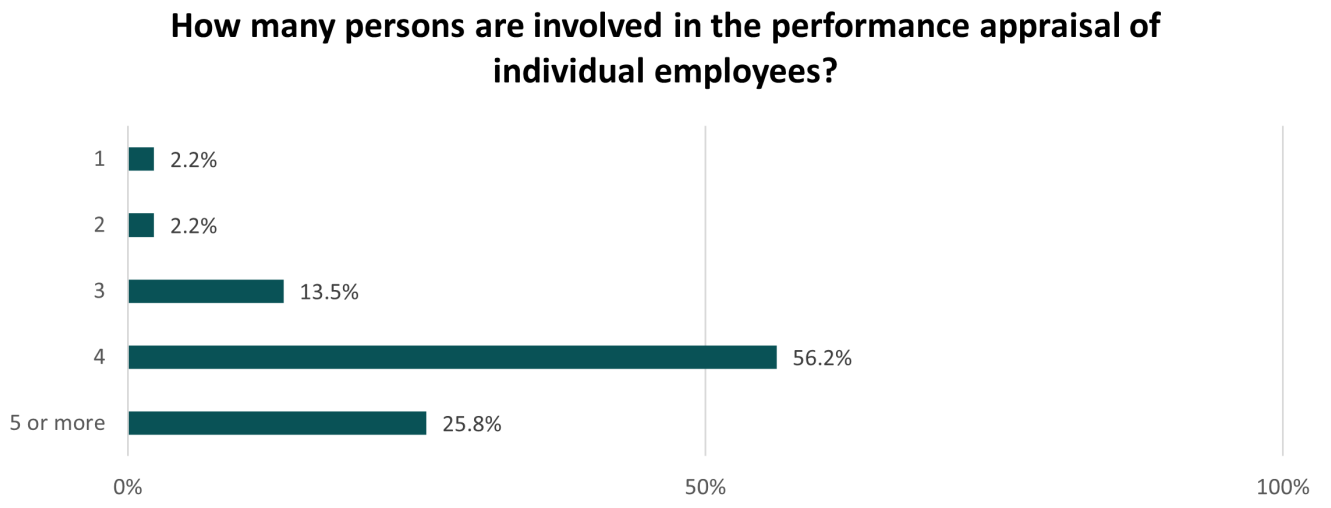
Performance appraisals are important and individual in Swiss software companies.

The handling of performance appraisals is illustrated in Figure 30. In 82% of companies, performance appraisal is based on employee's individual behaviour and attitudes at work. Furthermore, 79.8% state that this is focused on their development and progress at work. Somewhat less central are collective and long-term results (65.1%). They are not always (but often) carried out routinely and recurrently (68.2%)

Figure 31 shows that performance assessments are usually carried out by several people. Only in 4.4% of cases are fewer than three people involved. In the majority of cases (56.2%), four people are involved in the performance assessment.

Persons Involved in Performance Appraisal

Figure 31: Number of persons involved in performance appraisal

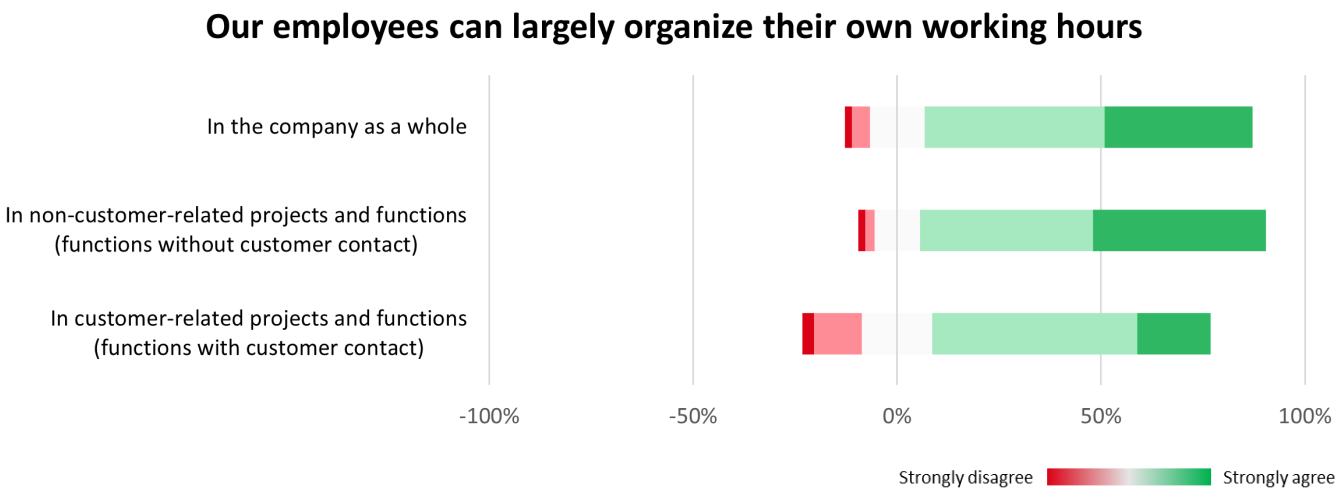


Source: SSIS 2025

N = 178

Freedom of Action Organizing in Working Hours

Figure 32: Organization of own working hours



Source: SSIS 2025

N = 179

A Lot of Freedom with Variance Depending on Function

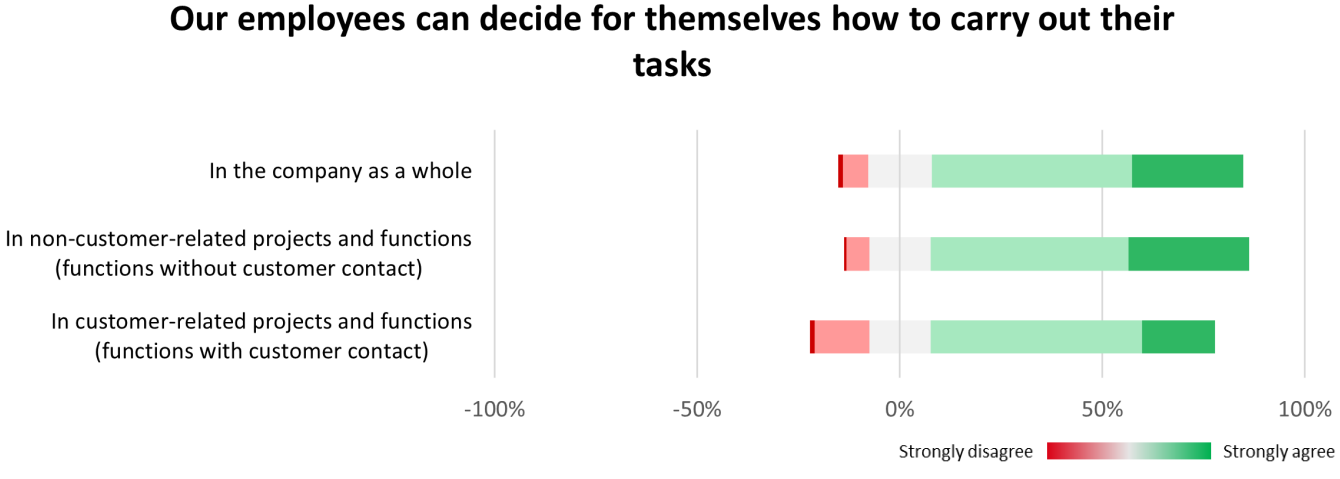
Self-determination is generally high, but there are differences depending on the process and tasks of the employees. The vast majority of employees can organize their working hours and tasks themselves.

In 80.4% of companies, employee can largely organize their own working hours. Freedom varies somewhat depending on the function (see Figure 32). In the case of non—customer related projects and functions freedom is somewhat larger (85%) than for customer related projects and functions (68.2%).

The situation is similar with regard to tasks. In the company as a whole, 76.9% of employees can decide for themselves how to carry out their tasks (see Figure 33). With 78.7% for non-customer related roles and 70.2% for customer related roles.

Freedom of Action in Task Management

Figure 33: Organization of task management

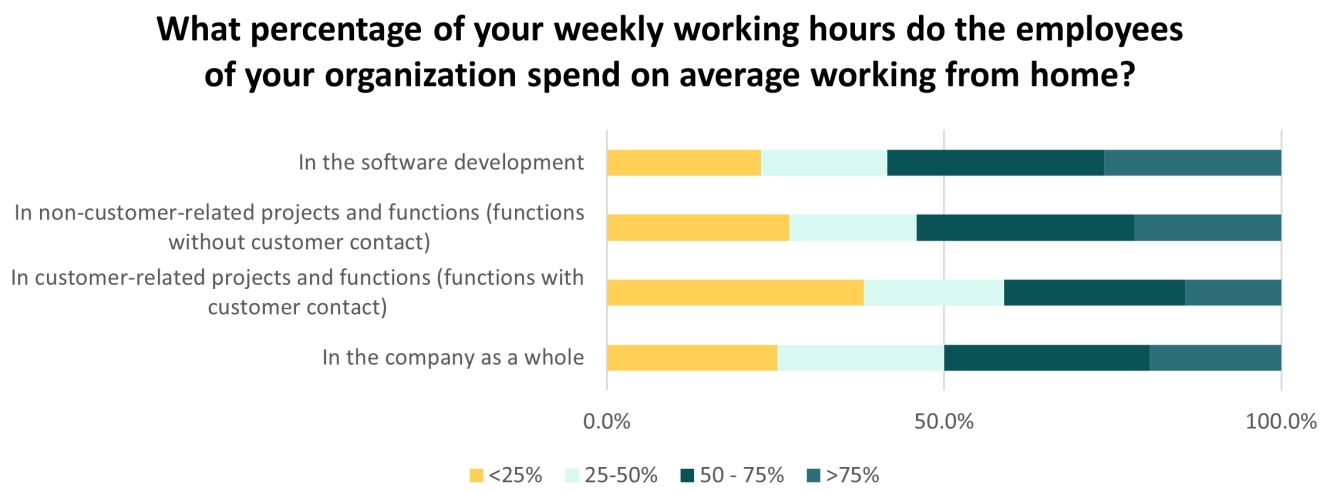


Source: SSIS 2025

N = 178

Time Spent in Home Office

Figure 34: Weekly working hours working from home



Source: SSIS 2025

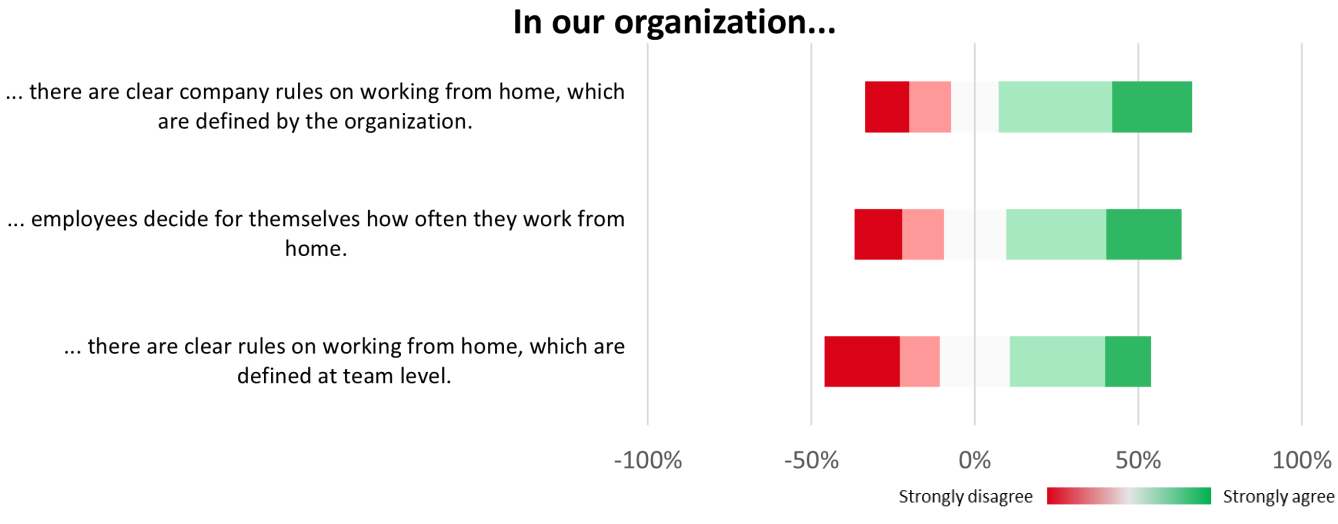
N = 174

A Lot of Freedom in a Defined Framework

Overall, employees of every second company can work from home for at least 50% of their working hours (see Figure 34). There are differences depending on the role: more working from home is possible in software development (on average 58.5% can work at least half of their working hours or more from home), less in tasks regarding non-customer-related projects (on average 54.2%) and customer-related projects (on average 41.1%). When focusing on the governance of these home office rules, the definition on how many hours can be worked from home is mostly defined on an organizational level (59.2% of organizations, see Figure 35). Less organizations let individuals decide on an employee level (53.6%) how often they work from home and in even less cases it is a decision made at team level (43.2%).

Home Office Governance

Figure 35: Rules for working from home

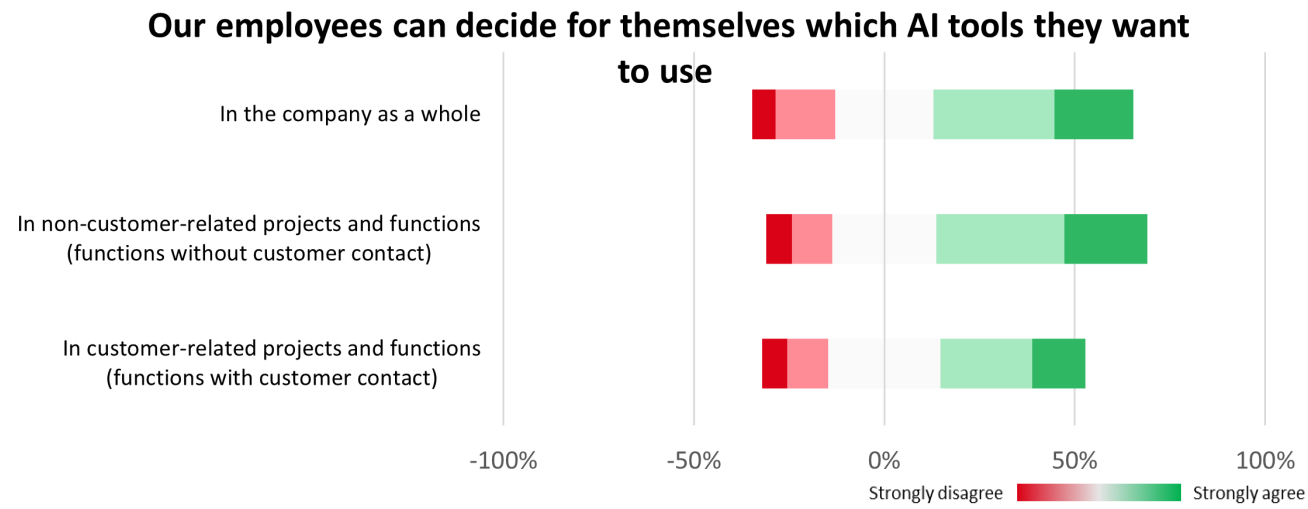


Source: SSIS 2025

N = 179

Freedom of AI Action

Figure 36: Use of AI tools



Source: SSIS 2025

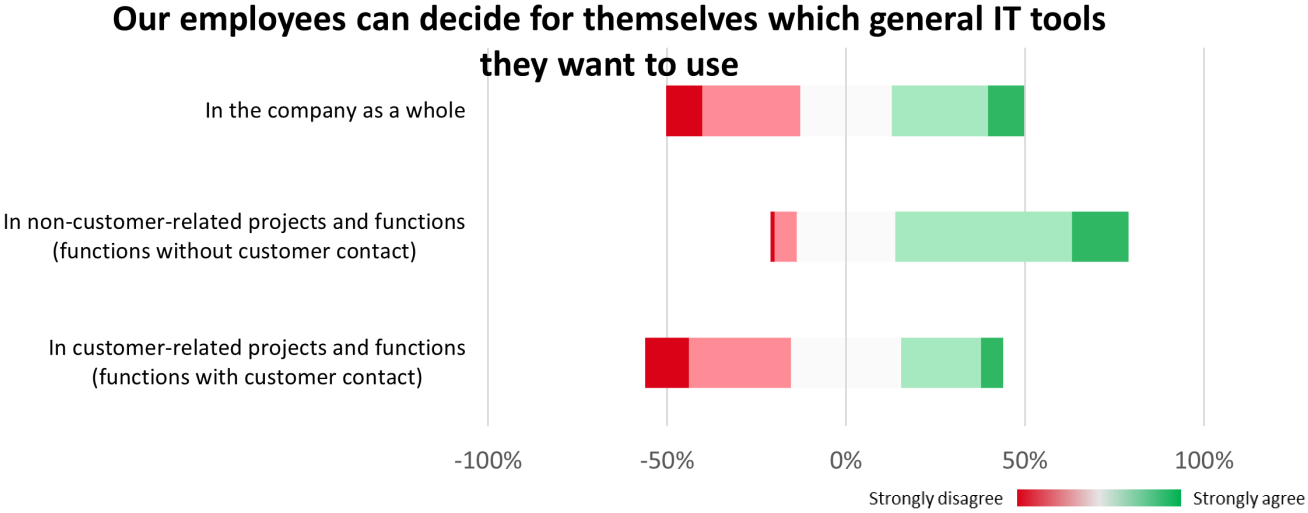
N = 179

Freedom in Choosing AI Tools Higher Than With General IT Tools

In addition to working hours and tasks, we wanted to know from companies how much freedom employees have in choosing their tools. There is still a relatively high degree of freedom when it comes to AI (see Figure 36). Companies are still in an experimental phase and have not yet established a highly structured approach to using AI tools. 52.5% of the companies agree that employees can decide for themselves which AI tools they want to use. Again, there is a slight variation between customer-oriented and non-customer-oriented functions. There is less freedom when it comes to IT tools, as these structures have been established for some time. Around 36.9% agree that employees should be allowed to choose the tools themselves, while 37.5% disagree with this statement. However, there is a notable difference between the functions here (see Figure 37).

Freedom of IT Action

Figure 37: Use of IT tools

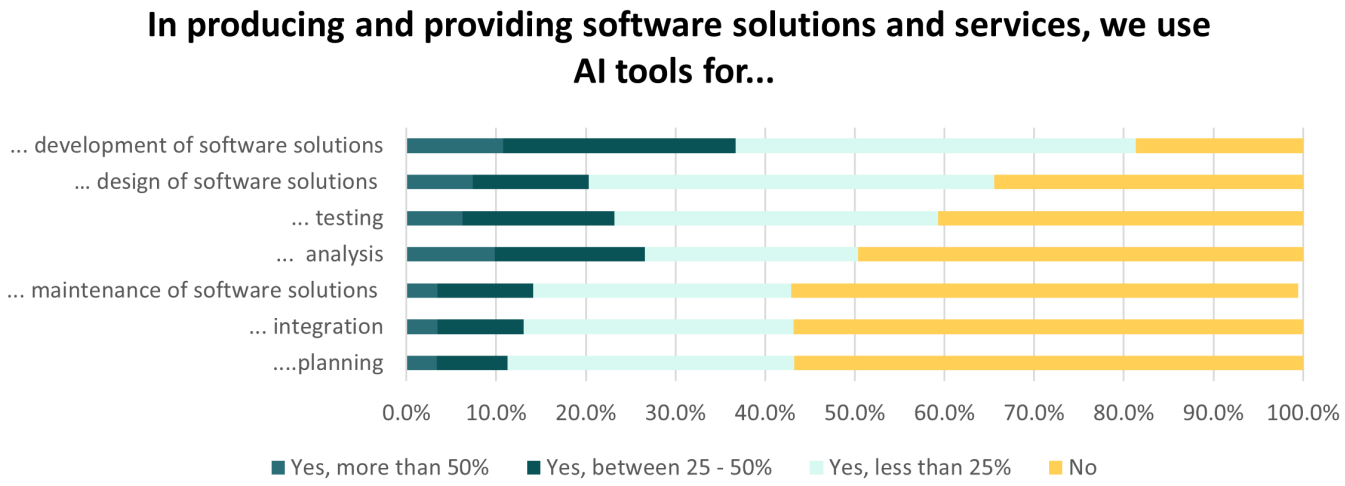


Source: SSIS 2025

N = 179

Use of AI

Figure 38: Usage of AI tools (reinvestigation of the 2024 Swiss Software Industry Survey)



Source: SSIS 2025

N = 178

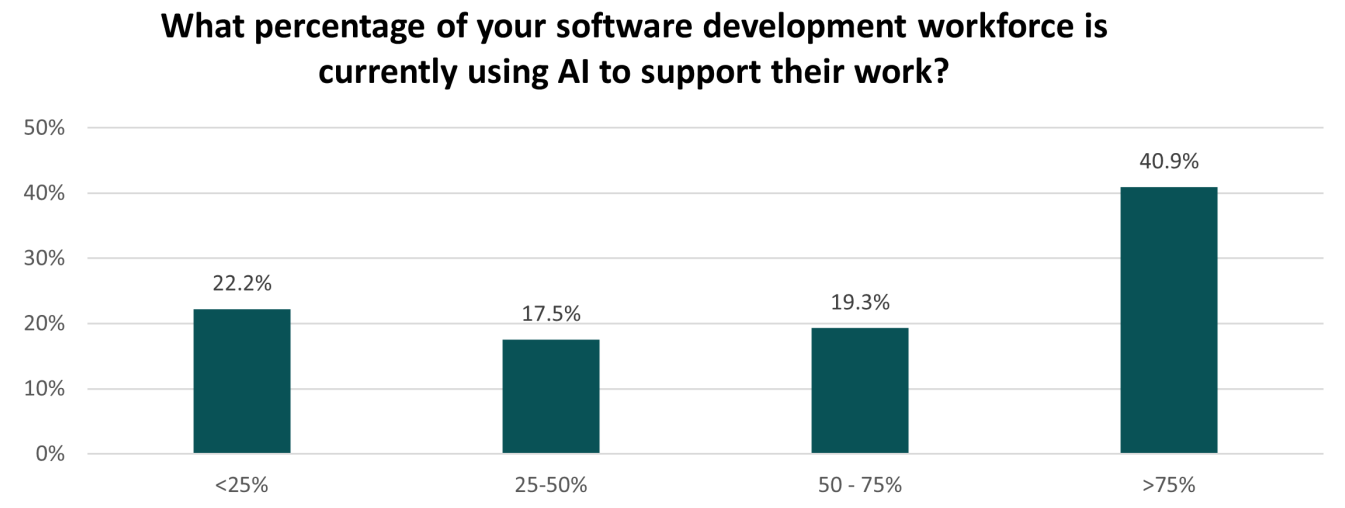
Increasing Use of AI

In last year's Swiss Software Industry Survey, we measured the use of AI in different phases of the software development lifecycle among organizations. In order to capture the development of this AI use, we reinvestigated this aspect in this year's survey. An increase of AI use among all phases but maintenance is observable in 2025 (see Figure 38). With 81.3% of software companies, AI is still mostly used in software development, with an increase in use of 34.5% compared to 2024.

Regarding the amount of the software development workforce using AI to support their work, Figure 39 shows that in most companies 75% or more of the workforce currently uses AI. On the other hand, in approximately every fifth company, less than 25% of their workforce is currently using AI to support their work processes.

Workforce Using AI

Figure 39: Amount of AI usage among software companies' workforce



Source: SSIS 2025

N = 171

Organizational Culture

Figure 40: Involvement, consistency, adaptability and mission in the organization

Source: SSIS 2025

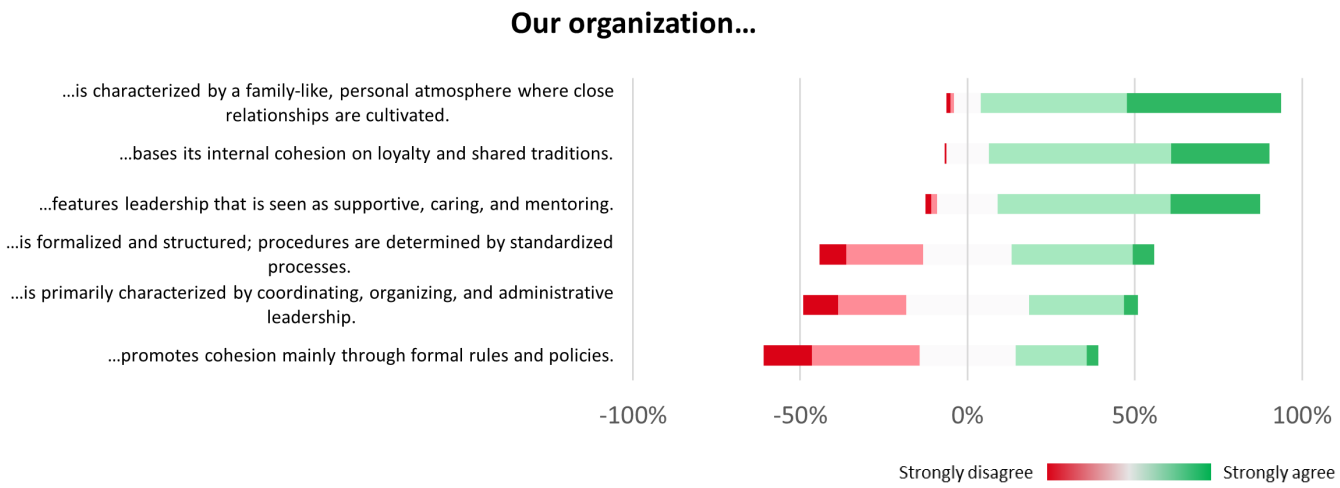
N = 179

Mission and Adaptability as Important Factors

With the increasing distribution and use of AI tools, fostering employees' sense of meaningfulness in their work is becoming increasingly important. In this context, companies in the Swiss software industry demonstrate strong alignment with the values of their organizational culture. Adaptability (87.9% of companies, see Figure 40), the pursuit of long-term goals (74.6%), and a shared vision (75.7%) are considered very important in most companies. Employee involvement is also a key priority (78.2%). While consistency is the least emphasized factor, it still receives high approval, with 67.1% of software companies valuing it.

Hierarchy and Clan Culture

Figure 41: Hierarchy and clan culture



Source: SSIS 2025

N = 172

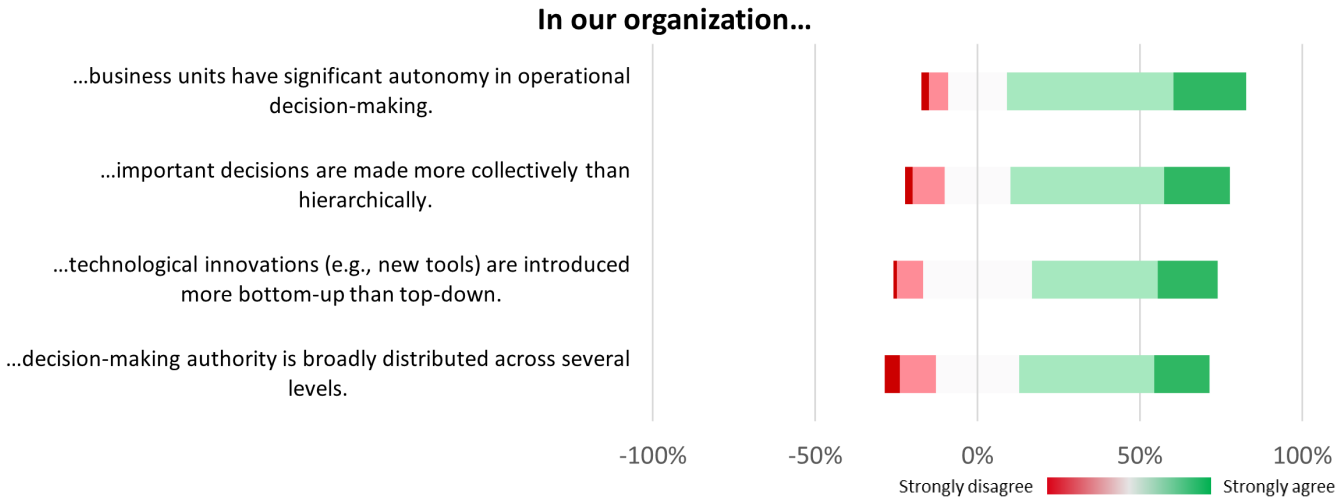
Low Hierarchy and Centralization

Figure 41 shows the norms in a company. Clan culture is important, as is a supportive and familiar environment. Hierarchy and formality are less central. 89.7% of the companies surveyed are characterized by a family-like, personal atmosphere where close relationships are cultivated. Whereas only 32.6% agree that their company is characterized by coordinating, organizing and administrative leadership.

When examining centralization, companies tend to pursue decentralization aspects (see Figure 42). In most companies, business units can decide autonomously (73.6%) and decisions are generally made collectively (67.6%) with the authority to make decisions being distributed across levels (58.5%). Also technological innovations are generally introduced bottom-up rather than being decided upon top-down by executives (57.2%)

Decentralization

Figure 42: Centralization and decentralization

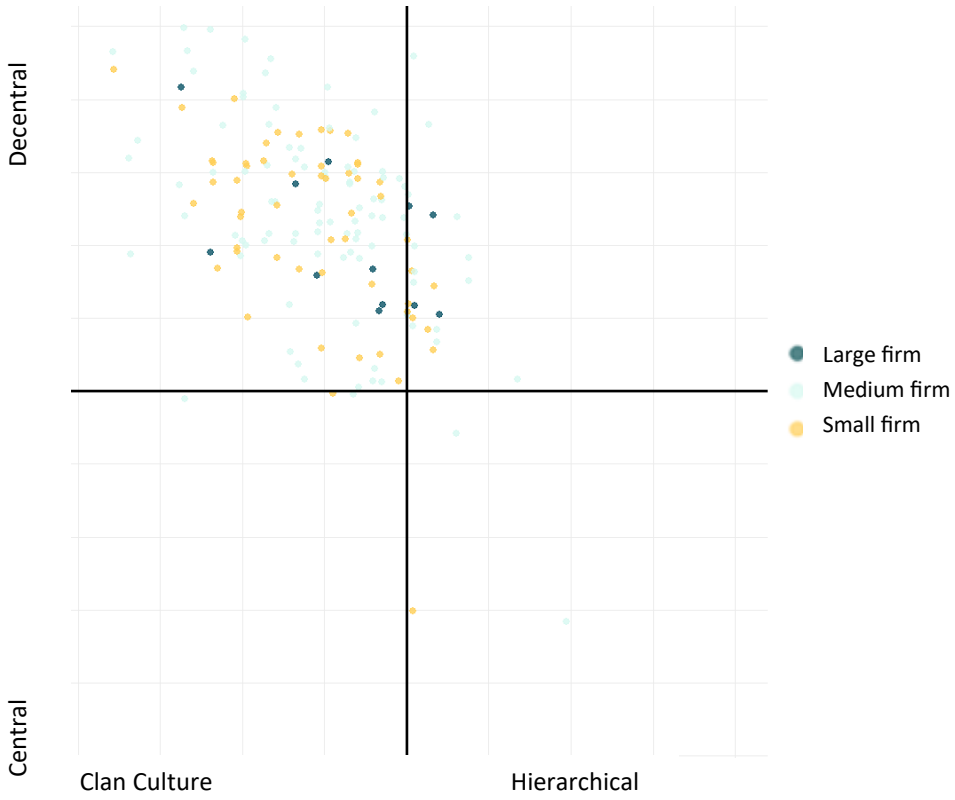


Source: SSIS 2025

N = 170

Organizational Culture

Figure 43: 2x2 Matrix of decentralization and clan culture



Source: SSIS 2025

N = 170

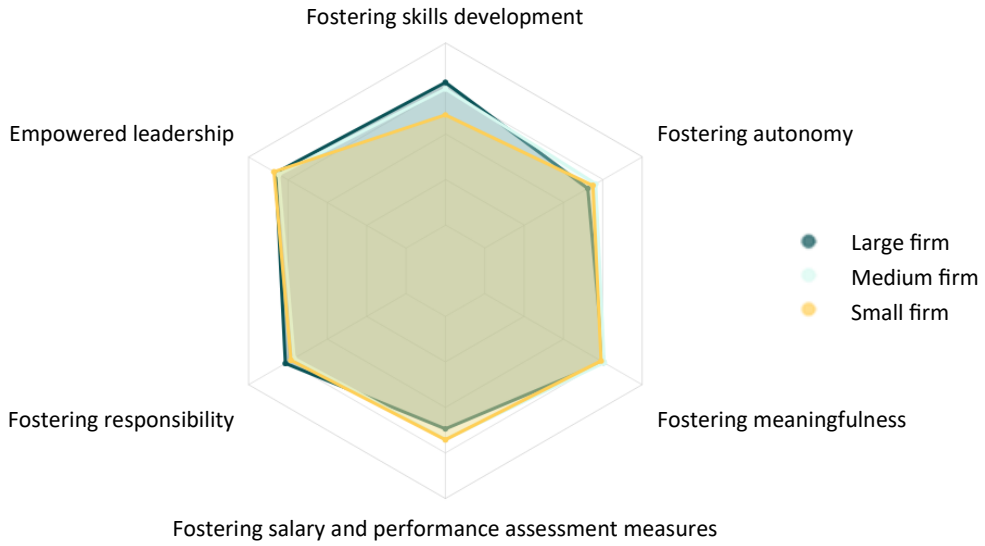
Larger Firms are More Centralized and Hierarchical

In Figure 43, we look at how the two aspects decentralization and Clan Culture are distributed among firms of different size. In general, a great majority of firms both favour Clan Culture over hierarchical structures and a decentralized over a centralized approach.

Within this general distribution, large firms tend to have more hierarchical structures than middle and small firms and they also tend to be more centralized. Except a few isolated cases, no noticeable differences can be seen between small and middle firms regarding these two dimensions, however.

New Work Measurements

Figure 44: The scope of New Work measurments regarding different firm sizes



Source: SSIS 2025

N = 178

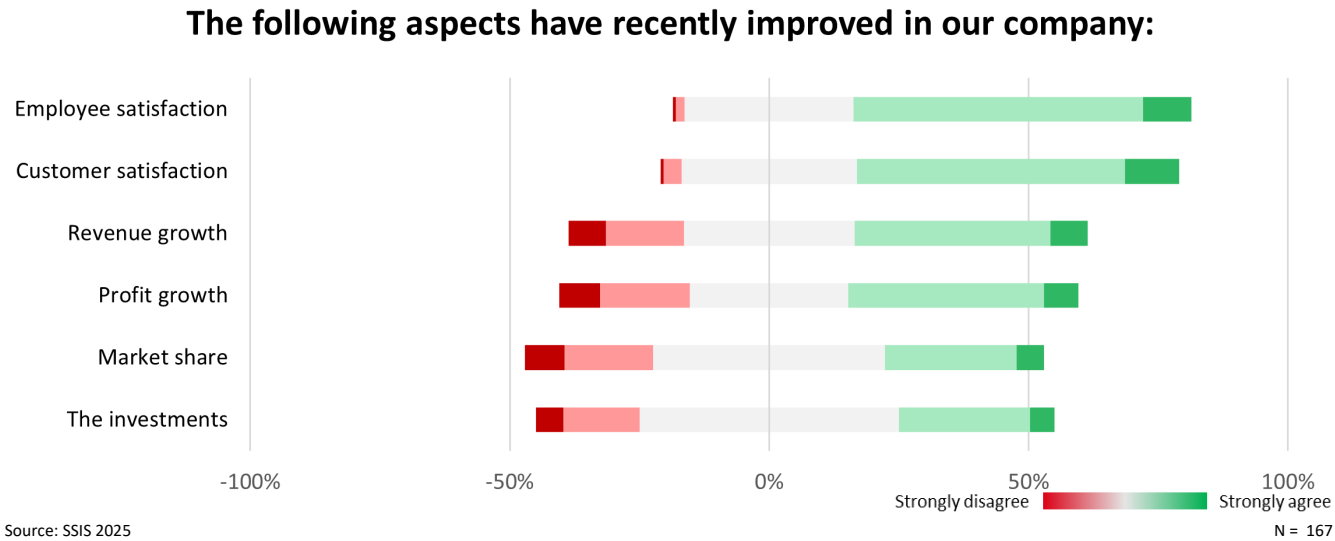
Employee and Customer Satisfaction Improved Most

After looking at the distribution of decentralization and Clan Culture aspects among varying firm sizes, Figure 44 illustrates the different scope of New Work measures of large, middle and small firms. In most dimensions of New Work, the scopes of firms of different sizes are similar. However, small firms showed less fostering of competence development of employees (3.03, on a scale of 1 of 5) than large (3.93) and middle firms (3.75). But on the other hand, small firms fostered to a greater extent measures regarding wage and performance evaluation (3.39) than large (3.09) and middle firms (3.38).

When asked about how companies perceived recent improvement in different performance measures, most companies perceived recent increase in employee (65.1%) and customer (62.2%) satisfaction (see Figure 45). Less improvement was perceived regarding revenue (44.9%) and profit (44.3%) growth, as well as market share (30.6%), and investments (30%).

Perceived Company Performance

Figure 45: Perception of factors that improved in the firm

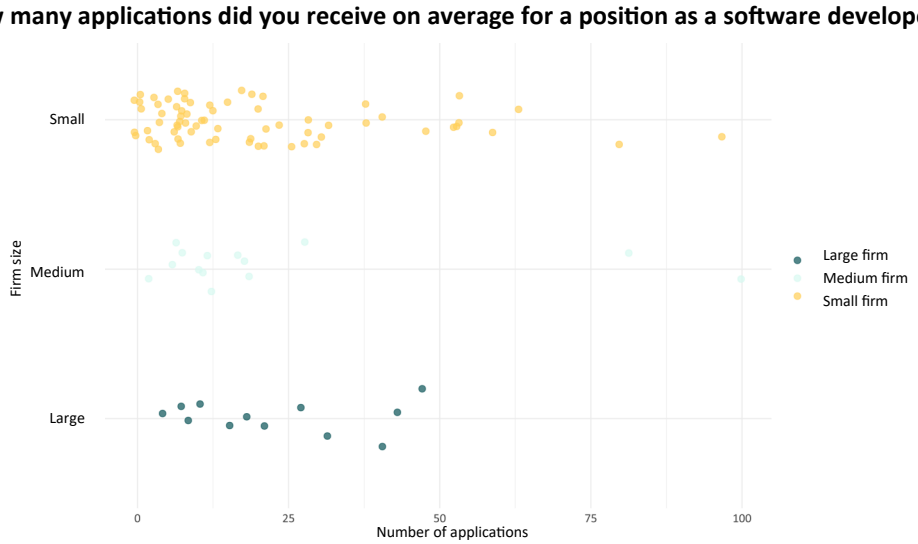


Source: SSIS 2025

N = 167

Number of Applications According to Firm Size

Figure 46: Perception of factors that improved in the firm*



Source: SSIS 2025

N = 95

Differences in Firm Performance According to Measures

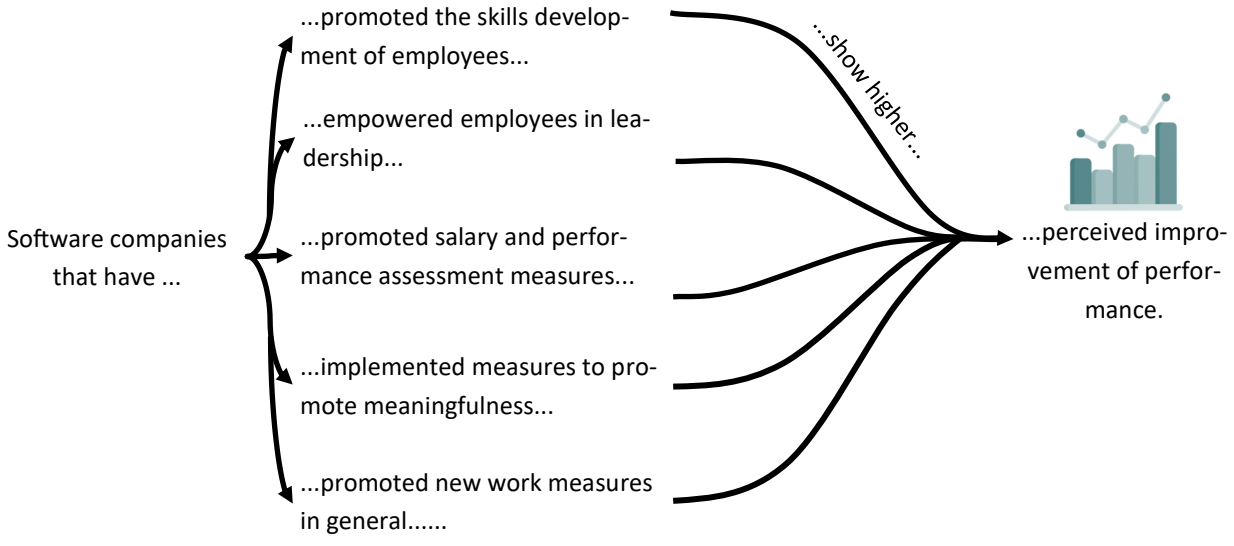
Figure 46 shows the distribution of the number of applications received on average for a position as a software developer in the year 2024. Most companies receive on average less than 25 applications, with a greater variance for small and large firms, than for medium firms.

Figure 47 illustrates which new work measures lead to higher perceived improvement in companies' performance. In general, companies which promoted new work measures perceived higher improvement in performance. Out of the different new work measures, the promotion of employees' skills development, leadership empowerment, fostering salary and performance assessment measures, as well as the implementation of measures to foster meaningfulness led to higher perceived improvement of performance of software companies.

*Four responses had a greater value than 100 and are not depicted in the illustration.

The Impact of New Work Measurements

Figure 47: The Impact of new work measurments on companies' performance



Source: SSIS 2025

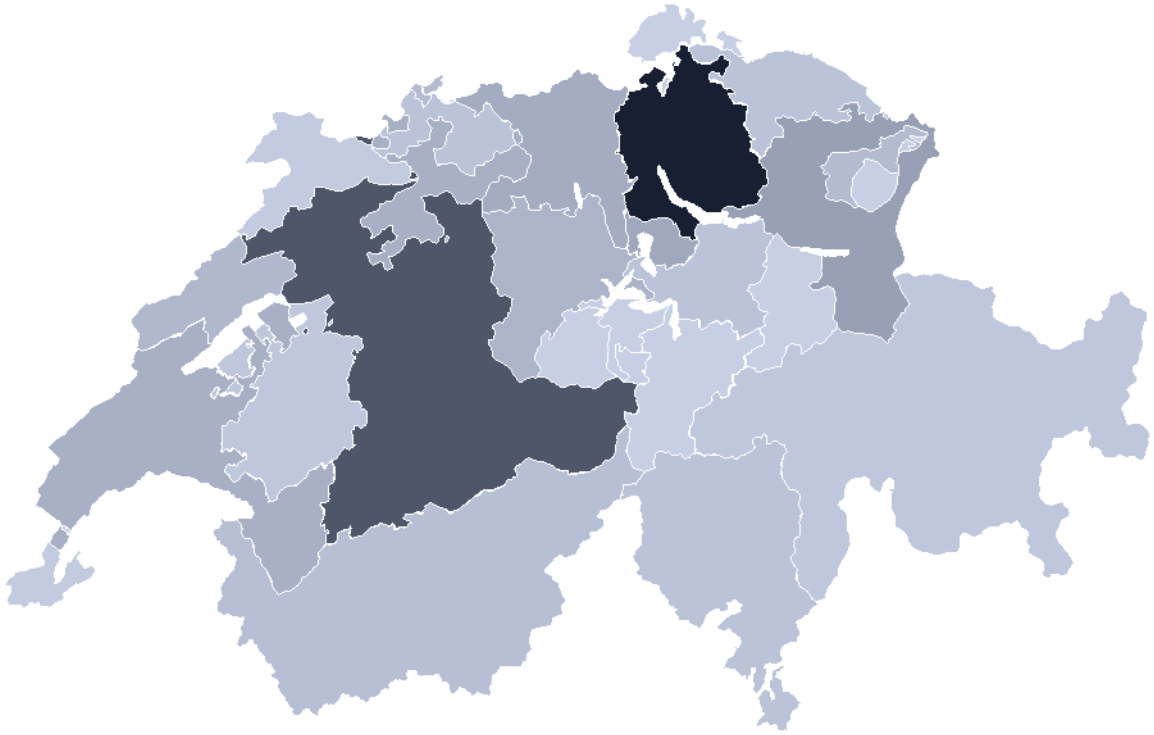
N = 184

Method and Official Statistics

About the SSIS

Geographical Distribution of the Participants in 2025

Figure 48: Participating companies per canton



Source: SSIS 2025

N = 168

About the SSIS in 2025

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 2023 and distribution of full-time equivalents in 2024 by industry

Sections	Added Value	FTE
Mining and quarrying	0.09%	0.10%
Manufacturing	20.99%	14.96%
Energy supply, water supply, waste management	2.12%	1.18%
Construction	3.54%	8.02%
Trade; repair of motor vehicles and motorcycles	16.03%	12.2%
Transportation, storage, information and communication	5.52%	6.63%
Accommodation and food service activities	1.59%	4.77%
IT and other information services	3.4%	3.02%
Financial service activities	4.17%	2.59%
Insurance	3.25%	1.05%
Real estate activities, professional, scientific, technical and administrative activities	16.24%	16.69%
Public administration	6.93 %	4.21%
Education	4.38%	6.24%
Human health and social work activities	7.71%	14.37%
Arts, entertainment, recreation and other services	1.67%	3.94%

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 3.4% to the Swiss GDP (see Table 1) and employs 3.02% 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.).