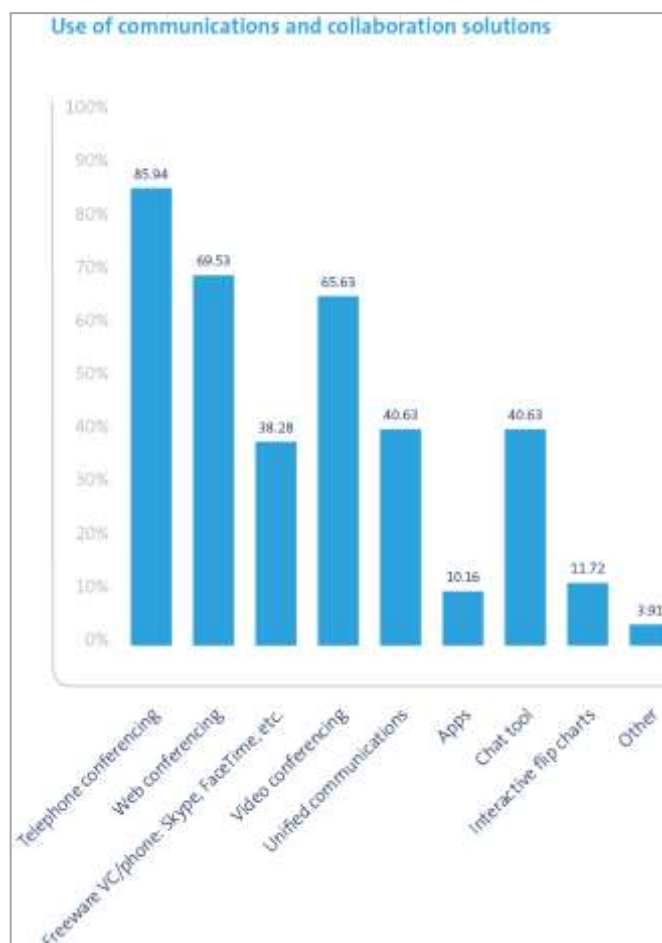


Study regarding communication and collaboration solutions – sustainability is not yet a central topic

International companies face major challenges when it comes to communication, both between their own sites and with customers and partners from around the world. Together with its scientific partner, the iimt (international institute of management in technology) of the University of Fribourg, Switzerland, Swisscom examined in a study how these companies use communication and collaboration solutions.

«Successful international collaboration is a key factor for sustainable added value in this globalised world,» says Prof. Dr. Stephanie Teufel from iimt. The study shows that telephone conference solutions are now standard for international collaboration and are one of the key communications instruments for collaboration across borders. Furthermore, around two thirds of those surveyed also use web or videoconference solutions. Flipcharts are now rarely used.



Significant differences can be seen when looking at usage according to branches. The service sector has a pioneering role in all categories. The assumption that the IT industry has a high affinity for communication and collaboration solutions is confirmed. It stands out, above all, for applications that intervene in business processes (customer services, customer consulting, maintenance work). When it comes to management meetings and virtual project/partner communications, on the other hand, this industry is below average. All industries use communications and collaboration solutions least frequently in the area of customer services.

| Usage by industry | | | | | | | |
|--|---|---------------|------------------------------------|--|------------------------|-------------------------------|-------------|
| Communications relationship | Industry Banks / credit institu- tions | Retail | Service pro- viders | Manufac- turing com- panies | Whole- sale | IT com- panies | ø |
| Management meetings | 7.00 | 6.00 | 6.50 | 6.15 | 7.13 | 5.75 | 6.27 |
| Cross-site coordination meetings | 7.83 | 7.29 | 7.45 | 7.04 | 7.75 | 8.00 | 7.17 |
| Virtual communication on projects | 6.33 | 6.86 | 7.40 | 6.78 | 6.50 | 6.50 | 6.70 |
| Partner communication / coordination meetings | 5.17 | 4.71 | 6.27 | 4.85 | 5.25 | 5.00 | 5.17 |
| Customer consulting / account management | 3.50 | 3.43 | 4.45 | 2.81 | 3.88 | 4.50 | 3.67 |
| Interviews | 2.82 | 3.14 | 4.36 | 3.33 | 4.25 | 4.13 | 3.89 |
| Maintenance work | 4.45 | 4.71 | 4.90 | 4.96 | 6.25 | 5.86 | 4.76 |
| Customer service | 3.00 | 2.57 | 4.64 | 2.89 | 4.50 | 5.00 | 3.43 |
| Inquiries / access to expert knowledge | 3.00 | 6.14 | 5.70 | 4.08 | 4.38 | 6.13 | 4.88 |
| (Values specified = average values. Scale: 1 = never, 10 = always) | | | | | | | |

Small companies with fewer than 100 employees and companies with 1,000 to 2,499 employees use the new communications solutions most frequently and were above average for eight out of nine of the solutions surveyed. In addition, small companies with fewer than 100 employees use communications and collaboration solutions to an above-average extent in the fields of maintenance work and customer services. Companies with more than 1,000 employees, by contrast, use these solutions to an above-average extent for access to expert knowledge.



| Usage according to company size | | | | | | | |
|--|---------------------|---------|---------|---------|-------------|---------|-------------|
| Communications relationship | Number of employees | | | | | | Ø |
| | < 100 | 100–199 | 200–499 | 500–999 | 1,000–2,499 | > 2,500 | |
| Management meetings | 7.00 | 5.57 | 6.60 | 5.87 | 6.59 | 5.40 | 6.20 |
| Cross-site coordination meetings | 7.75 | 6.43 | 7.06 | 6.38 | 7.73 | 7.20 | 7.21 |
| Virtual communication on projects | 6.62 | 5.43 | 6.44 | 6.88 | 6.86 | 7.11 | 6.59 |
| Partner communication / coordination meetings | 5.56 | 4.50 | 5.44 | 5.63 | 5.86 | 4.30 | 5.20 |
| Customer consulting / account management | 3.94 | 3.57 | 2.87 | 3.00 | 4.18 | 3.55 | 3.61 |
| Interviews | 3.50 | 2.64 | 3.44 | 3.13 | 4.50 | 4.00 | 3.67 |
| Maintenance work | 5.13 | 3.93 | 4.33 | 4.25 | 5.57 | 5.45 | 4.91 |
| Customer service | 4.72 | 2.64 | 3.87 | 2.29 | 3.32 | 3.26 | 3.37 |
| Inquiries / access to expert knowledge | 4.71 | 3.31 | 4.40 | 4.88 | 5.09 | 5.15 | 4.66 |
| (Values specified = average values. Scale: 1 = never, 10 = always) | | | | | | | |

Sustainability aspects are not yet a focus

Regardless of the industry and company size, the majority of those surveyed see the benefits of communications and collaboration solutions in the reduction of costs, increased productivity and acceleration of work processes. Sustainability aspects are not a focus. All industries see the least benefits in this area. This is particularly evident in the retail and manufacturing industries.

The Global Study

The Global Study focuses on companies that have international sites but whose main office is located in Switzerland. The study was carried out using 946 digital questionnaires and six one-to-one interviews. This resulted in 128 usable data sets.

Berne, 18 March 2013