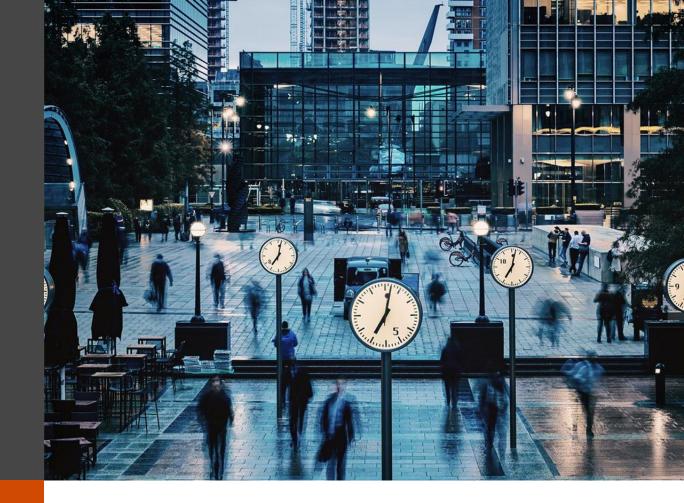
European Private Business Survey



June 2019





About the survey

About the survey



2,443

Structured interviews conducted with key decision makers in family businesses and entrepreneurial businesses with a sales turnover of €10m+.



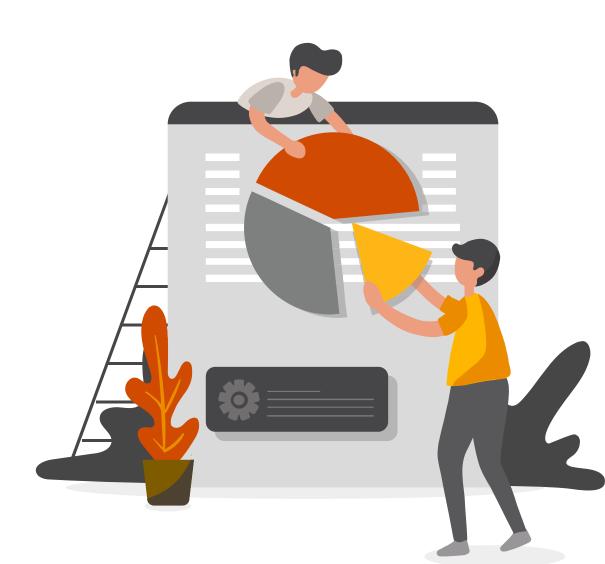
Across 53 countries.



Interviews conducted between February and April 2019.



Interviews conducted by telephone in local language.

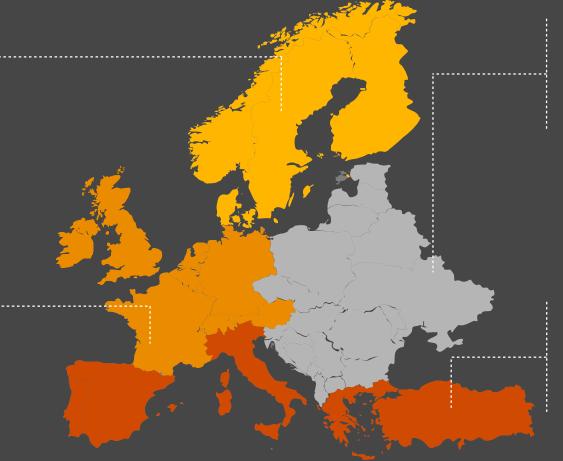


Survey sample EU 31 – Survey among 2,443 companies



Central Europe = 1210

Austria = 90 Belgium = 90 France = 140 Germany = 400 Ireland = 50 Luxembourg = 30 Netherlands = 100 Switzerland = 90 UK = 220



Central and Eastern Europe = 450 Baltics = 60 Central South-East Europe = 200 • Bulgaria = 50 • Croatia = 30

- Romania = 50
- Slovenia = 40
- Slovakia = 30
- Czech Republic = 50
- Hungary = 50
- Poland = 90

Southern Mediterranean = 583

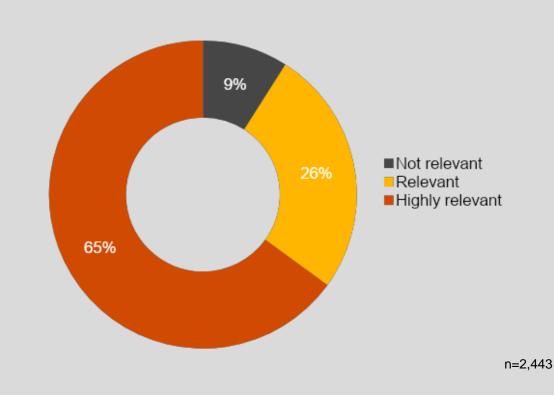
Cyprus = 30Greece = 60Italy = 180Malta = 30Portugal = 60Spain = 123Turkey = 100



Digitalisation

Long-term relevance of digitalisation Companies in Europe finally recognize the importance of digitalisation for the viability of their business.

And how relevant is digitalisation for the long-term viability of your business?



Proportion of "highly relevant"

Area	Percentage	
Central and Eastern Europe	63.5	
Africa	81.0	
Middle East	78.0	
Total EMEA	66.9	
Industry	Percentage	n=2,993
Industry and manufacturing	62.9	
Retail	65.7	
Services	65.1	
Building and Construction	57.0	
Transportation	68.6	
Energy	76.6	
Financial services	84.6	
Real estate	52.9	
Healthcare and pharma	71.4	

Long-term relevance of digitalisation by country

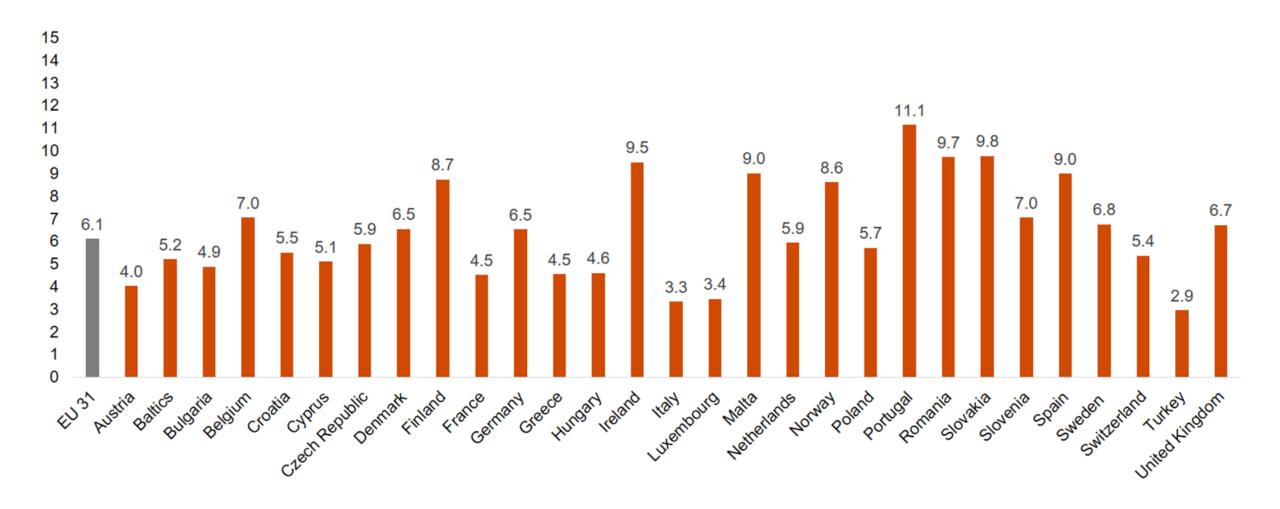
Entrepreneurs from Romania, Ireland, and Finland in particular see digitalisation as very relevant for the viability of their business.

EU31	65%		26%	9%	
Netherlands	85%			13% 2%	
United Kingdom	85%			13% 3%	
Norway	84%			10% 6%	
Romania	82%			<u>18%</u>	
Portugal	80%			3% 7%	
Spain	78%			6%	
Denmark	78%			<u>6%</u>	
Baltics	77%			22% <mark>2</mark> %	
Malta	77%			<u>0%</u> 3%	
Italy	74%		23		
Cyprus	70%		23%	7%	
Croatia	70%		17%	13%	Highly relevant
Sweden	68%		22%	10%	
Belgium	68%		28%	4%	Relevant
Bulgaria	64%		20%	16%	
Slovenia	63%		20%	17%	Not relevant
Germany	59%		30%	12%	
Poland	58%		28%	14%	
Turkey	56%		33%	11%	
Finland	56%		44%		
Greece	55%		37%	8%	
Slovakia	53%	30%		18%	
Ireland	52%		48%		
Switzerland	51%		44%	4%	
Austria	49%	39%	2	12%	
Hungary	48%	38%		14%	
France	44%	34%		23%	
Czech Republic	40%	40%		20%	
Luxembourg	33%	57%		10%	

7

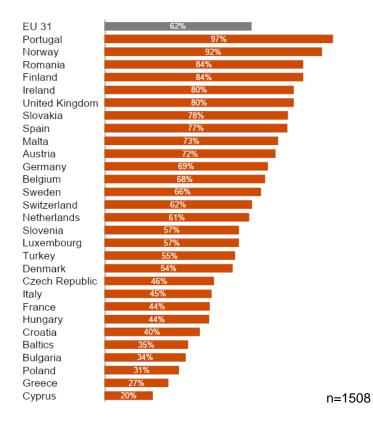
Digital understanding score

The index ranges from 0-15. Portuguese companies score highest, Turkish companies lowest.



Significance of digitalisation by country (1/2)Entrepreneurs in Portugal, Romania and Norway have the best understanding of digitalisation.

Digital product enhancement/use of digital technologies



Process automation/Internet of things/IoT

EU 31	62%	
Portugal	93%	
Romania	86%	
Malta	83%	
Spain	83%	
Netherlands	80%	
Slovakia	78%	
Bulgaria	74%	
Norway	72%	
Slovenia	70%	
Cyprus	70%	
Greece	70%	
Ireland	68%	
Switzerland	68%	
Poland	68%	
Denmark	66%	
Germany	65%	
Hungary	64%	
Croatia	60%	
Italy	60%	
Belgium	59%	
Czech Republic	58%	
Finland	58%	
United Kingdom	54%	
Baltics	53%	
Sweden	50%	
France	44%	
Austria	39%	
Turkey	28%	
Luxembourg	27%	

Data analytics for tailored products/services

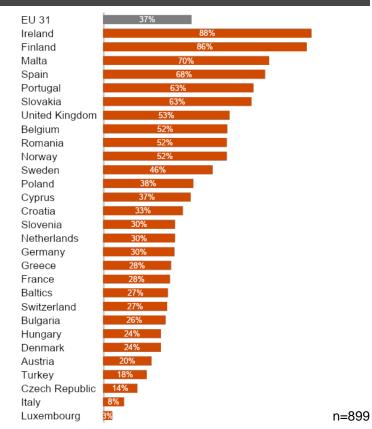
EU 31	52%
Ireland	90%
Malta	83%
Portugal	83%
Slovakia	78%
Romania	76%
Finland	76%
Spain	70%
Belgium	61%
United Kingdom	58%
Norway	58%
Croatia	57%
Cyprus	57%
Germany	56%
Switzerland	54%
Luxembourg	53%
Denmark	50%
Baltics	48%
Slovenia	47%
Czech Republic	46%
Netherlands	46%
Poland	46%
Bulgaria	44%
France	39%
Sweden	38%
Italy	36%
Austria	34%
Greece	33%
Hungary	32%
Turkey	13%

n=1263

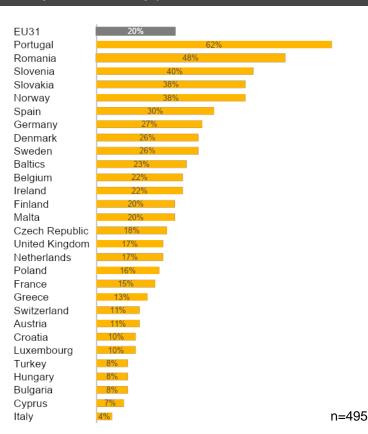
Significance of digitalisation by country (2/2)

The significance of end-to-end solutions is best recognized by companies in Ireland and Finland.

End-to-end solutions



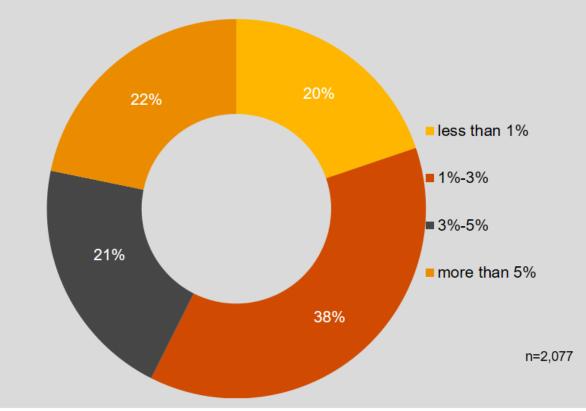
Ecosystem for many partners



Overall investments in digitalisation

The majority of EU companies want to invest 1-3% of their overall investments in digitalisation over the next 5 years.

Please indicate the approximate average percentage of your overall investments which will be allocated to digitalisation in the next 5 years.



Area	Percentage	
Central and Eastern Europe	23.1	
Africa	25.4	
Middle East	17.4	
Total EMEA	21.5	
Industry	Percentage	n=2,993
Industry and manufacturing	18.7	
Retail	20.7	
Services	27.2	
Building and Construction	14.5	
Transportation	23.2	
Energy	29.1	
Financial services	26.9	
Real estate	5.9	
Healthcare and pharma	20.7	

European Private Business Survey PwC

Overall investments in digitalisation by country

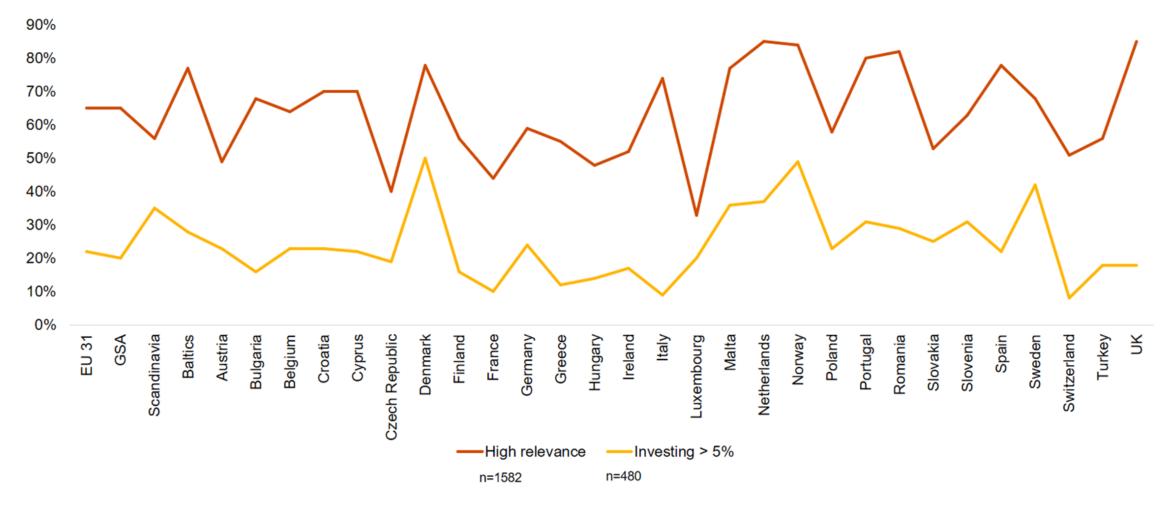
Entrepreneurs from Denmark, Norway and the Netherlands plan to invest more than 5% of their overall investments in digitalization.

EU31	20%	38%	21%		22%	
Denmark	9% 20%	20%		50%		
Norway	7% 24%	20%	00/	49%		
Sweden Netherlands	17%	35%	6%	<u> </u>		
Malta	2% <u>35%</u> 14%	32%	18%	<u>37%</u>		
Slovenia	23%	23%	23%	<u>30%</u> 31%		
Portugal	17%	29%	23%	31%		
Romania	18%	41%	12%	29%	6	
Baltics	15%	28%	17%	28%		
Slovakia	25%	17%	33%	2	5%	
Germany	14%	39%	24%		24%	
Austria	22%	27%	28%		23%	Less than
Belgium	10%	42%	26%		23%	- 40/ 20/
Croatia	18%	32%	27%		23%	<mark>=</mark> 1%-3%
Poland	23%	34%	21%		23%	■ 3%-5%
Spain	15%	37%	27%		22%	
Cyprus	15%	52%		11%	22%	more than
Luxembourg	10%	43%	27%		20%	
Czech Republic	30%	30%		21%	19%	
United Kingdom	20%	44%	· · · · · · · · · · · · · · · · · · ·	19%	18%	
Turkey Ireland	<u> </u>	35%	49%	6%	<u>18%</u> 17%	
Finland	<u>29%</u> 		49%	9%	<u> </u>	
Bulgaria	31%	29%	40.70	24%	16%	
Hungary	31%	28%		26%	14%	
Greece	12%	64%		12%	12%	
France	30%		44%	16%	10%	
Italy	29%		3%	1970	9%	
Switzerland	14%	57%		20%	8%	

n=2,077

Digital – Correlation of high relevance and investments

There is a clear link between the assessed importance of digitalization for the viability of the business and the investments for digital technologies. High relevance is accompanied with higher investments spent. Not everywhere though.



Sources to fund digitalisation Private businesses rely on internal cash flow for financing digitalisation.

And which of the following sources, if any, do you think you will use to help fund digitalisation? (Multiple Answers)

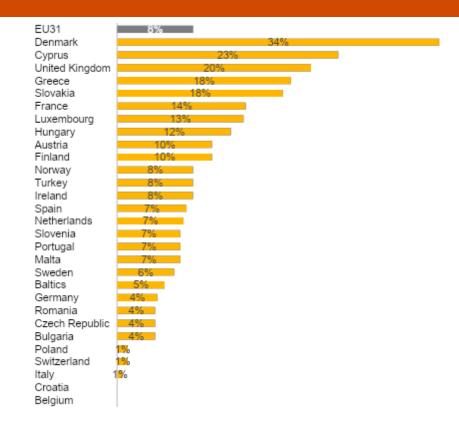


Use of private equity to fund digitalisation

Entrepreneurs in Denmark, Cyprus, and United Kingdom are more open towards private equity/venture capital for funding digitalisation.

n=202

Private equity/Venture capital



Proportion of "Private Equity" Area Percentage Central and Eastern Europe 6.8 Africa 23.5 Middle East 15.0 **Total EMEA** 9.9 Industry Percentage n=2,993 Industry and manufacturing 6.3 Retail 12.5 Services 7.6 **Building and Construction** 8.9 Transportation 8.7 6.3 Energy **Financial services** 15.4 Real estate 11.8 8.6 Healthcare and pharma

Sources to fund digitalisation by country Most entrepreneurs want to finance digitalization with internal resources.

Bank lending	/credit lines	In
EU31	29%	
Ireland	88%	
Finland	78%	:
Belgium	43%	
United Kingdom	42%	
Spain	39%	
Turkey	37%	
Romania	34%	
Germany	33%	
France	30%	
Portugal	28%	
Czech Republic	28%	
Cyprus	27%	
Slovakia	25%	
Poland	23%	
Baltics	22%	
Bulgaria	20%	
Greece	20%	
Denmark	20%	
Switzerland	17%	
Norway	16%	
Netherlands	16%	
Italy	16%	
Malta	13%	
Austria	12%	
Slovenia	10%	
Hungary	10%	
Croatia	10%	
Luxembourg	7%	
Sweden	💴 n=70	4

nternal resources (cash, cash flow etc.)

EU31	76%	
Luxembourg	100%	
Switzerland	97%	
Norway	96%	
Slovenia	93%	
Slovakia	90%	
Romania	90%	
Austria	89%	
Sweden	88%	
United Kingdom	86%	
Germany	86%	
Portugal	85%	
Czech Republic	82%	
Croatia	80%	
Malta	80%	
Baltics	80%	
Bulgaria	78%	
Italy	78%	
Poland	77%	
Netherlands	76%	
Spain	75%	
Hungary	74%	
Cyprus	63%	
Greece	58%	
Finland	58%	
Denmark	58%	
France	55%	
Belgium	52%	
Turkey	42%	
Ireland	<mark>28%</mark> N:	=1862

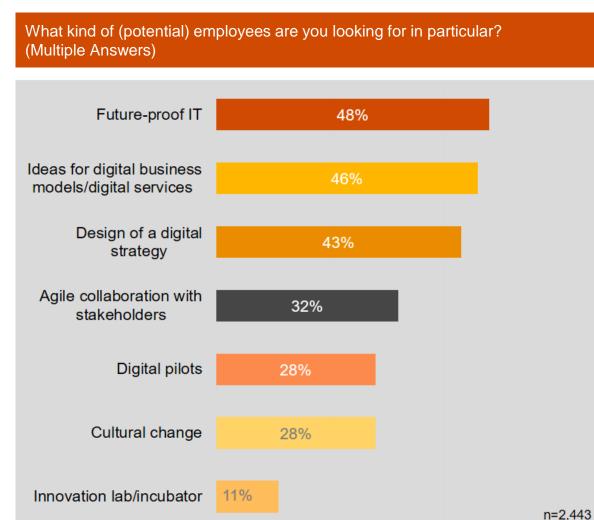
Capital markets (bonds, debt issuance etc.)

EU31	5%
France	17%
United Kingdom	14%
Norway	10%
Spain	8%
Slovakia	8%
Slovenia	7%
Austria	7%
Portugal	7%
Luxembourg	3%
Malta	3%
Cyprus	3%
Poland	2%
Italy	2%
Belgium	2%
Romania	2%
Hungary	2%
Baltics	2%
Germany	2%
Netherlands	2%
Finland	2%
Turkey	2%
Greece	2%
Switzerland	1%
Czech Republic	
Croatia	
Bulgaria	
Sweden	
Denmark	
Ireland	

n=114

Measures taken for digitalisation

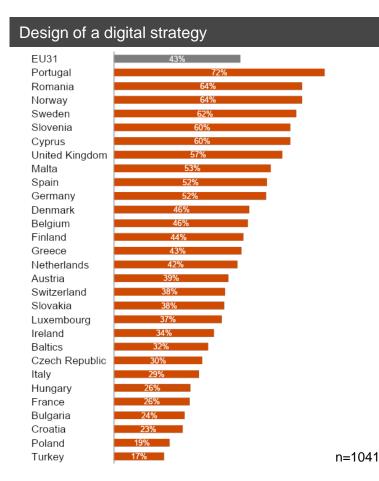
Entrepreneurs in the EU have already taken steps to transform their business. Most important are digital business models and implementing a future-proof IT.

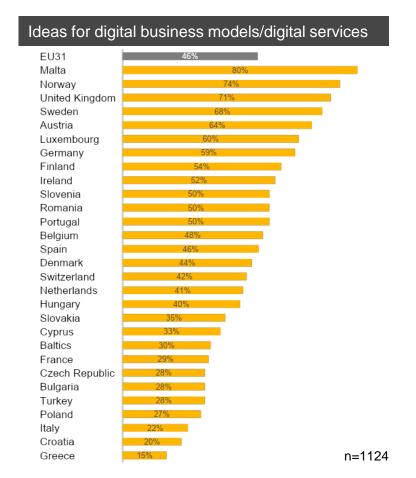


Most frequently stated	
Area	Step
Central and Eastern Europe	Future-proof IT (38%)
Africa	Design of a digital strategy (55%)
Middle East	Ideas for digital business models (46%)
Total EMEA	Ideas for digital business models (45%)
Industry	Step n=2,993
Industry and manufacturing	Future-proof IT (46%)
Retail	Future-proof IT (45%)
Services	Ideas for digital business models (56%)
Building and Construction	Future-proof IT (51%)
Transportation	Future-proof IT (50%)
Energy	Design of a digital strategy (50%)
Financial services	Future-proof IT (67%)
Real estate	Future-proof IT (59%)
Healthcare and pharma	Design of a digital strategy (51%)

Measures taken for digitalisation by country (1/3)

The throughout understanding of digitalisation in Portugal and Romania is also reflected in their approach towards transformation.





Digital pilots		
EU31	28%	
Norway	66%	
Sweden	50%	
Ireland	46%	
Spain	45%	
Belgium	41%	
Romania	40%	
Denmark	40%	
Finland	36%	
Netherlands	36%	
Portugal	35%	
Germany	34%	
Slovenia	33%	
Bulgaria	32%	
Baltics	32%	
United Kingdom	27%	
Switzerland	27%	
Hungary	26%	
Malta	23%	
Austria	21%	
Slovakia	20%	
Greece	18%	
Czech Republic	18%	
Poland .	14%	
France	14%	
Italy	14%	
Cyprus	10%	
Luxembourg	10%	
Turkey	7%	
Croatia	7%	n=

Measures taken for digitalisation by country (2/3)German entrepreneurs feel the most need to get the IT right.

Innovation la	b/incubator
EU31	11%
Norway	26%
Netherlands	25%
Sweden	20%
Portugal	17%
Spain	16%
Denmark	16%
Slovakia	15%
United Kingdom	15%
Turkey	14%
Slovenia	13%
Belgium	13%
Malta	13%
Italy	11%
Cyprus	10%
Germany	10%
Greece	10%
Switzerland	10%
Bulgaria	8%
Baltics	8%
Ireland	8%
Austria	7%
France	6%
Romania	6%
Poland	4%
Hungary	4%
Czech Republic	4%
Finland	4%
Croatia	
Luxembourg	

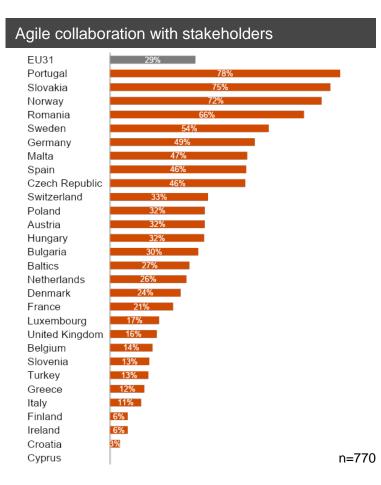
Future-proof	IT	
EU31	48%	
Germany	74%	
Malta	73%	
Austria	71%	
Norway	70%	l
Sweden	70%	
United Kingdom	66%	
Romania	64%	
Slovakia	63%	
Luxembourg	60%	
Portugal	57%	
Spain	50%	
Finland	50%	
Netherlands	49%	
Czech Republic	48%	
Ireland	48%	
Bulgaria	44%	
Baltics	40%	
Denmark	38%	
France	34%	
Slovenia	33%	
Croatia	33%	
Hungary	26%	
Hungary	26%	
Belgium	26%	
Poland	22%	
Italy	15%	
Cyprus	13%	4470
Greece	12%	n=1179
Turkey	<mark>.5%</mark>	

Cultural change

	19-	
EU31	28%	
Malta	77%	
Portugal	62%	
Norway	60%	
Spain	53%	
Slovakia	53%	
Sweden	44%	
Romania	42%	
Greece	42%	
Cyprus	40%	
United Kingdom	37%	
Slovenia	33%	
Baltics	33%	
Finland	32%	
Netherlands	32%	
Denmark	28%	
Germany	27%	
Poland	24%	
Hungary	24%	
Belgium	21%	
Ireland	20%	
Austria	16%	
France	15%	
Switzerland	14%	
Italy	12%	
Czech Republic	10%	
Bulgaria	8%	
Croatia	7%	
Luxembourg	7%	n=
Turkey	4%	

Measures taken for digitalisation by country (3/3)

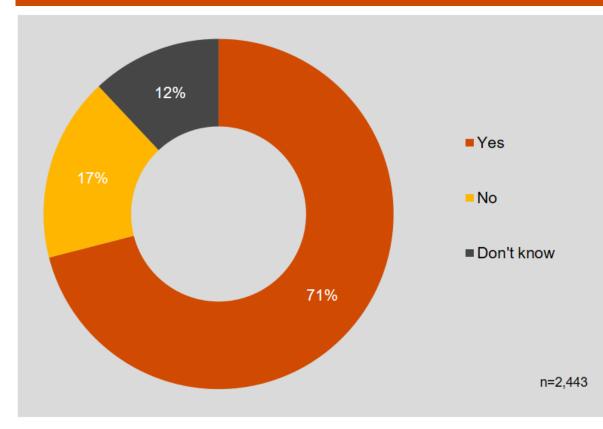
Entrepreneurs in Portugal and Slovakia frequently collaborate with with stakeholders.



Board composition

The vast majority of the surveyed entrepreneurs are convinced that their board is suitably composed to support their digital journey

Is your advisory/supervisory board composition suitably composed to support your digital strategy?

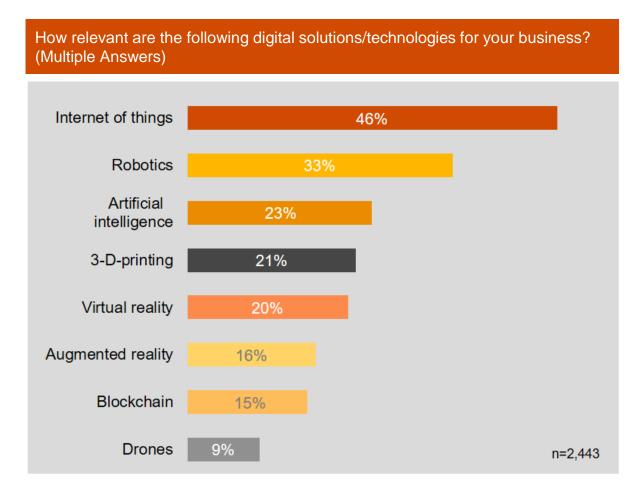


Proportion of "yes"		
Area	Percentage	
Central and Eastern Europe	64.0	
Africa	80.5	
Middle East	79.5	
Total EMEA	71.7	
Industry	Percentage	n=2,993
Industry and manufacturing	70.6	
Retail	71.3	
Services	71.9	
Building and Construction	67.8	
Transportation	72.1	
Energy	71.9	
Financial services	76.9	
Real estate	82.4	
Healthcare and pharma	74.3	

Support for the digital strategy by country Entrepreneurs receive approval from the advisory board throughout the EU.

EU 31	71%		17%	13%	
Luxembourg	100				
Austria	92%	92%			
Switzerland	88%				
Germany	84%			8% 9%	
Portugal	83%			<u>12%</u> 5%	
Cyprus	83%			<u> 10% </u>	
Spain	81%			7% 12%	
Romania	80%			20%	Yes
Malta	80%			20%	- 165
Croatia	80%			13% 7%	
Greece	78%			<u>13% 8%</u>	
United Kingdom	77%			<u>3% 10%</u>	No 🛛
Norway	76%			6% 8%	
Bulgaria	68%		21%	11%	
Italy	66%		20%	14%	
Poland	64%		21%	14%	■ Don't
Sweden	64%		22%	14%	know
Slovakia	63%		25%	13%	
Ireland	62%		32%	6%	
Belgium	<u> </u>		20%	18%	
Denmark	58%	4.20/	32%	10%	
Slovenia	57%	<u>13%</u> 20%		30%	
Hungary Finland	56%		200/	24%	
France	<u> </u>	23%	30%	<u> </u>	
Netherlands	51%	14%	35	<u> </u>	
Czech Republic	50%		42%	8%	
Turkey	32%	41%	+2.70	27%	
Baltics	67%		12%	22%	0.440
Dattos				22.70	n=2,443

Relevance of Essential Eight technologies Internet of Things is the most relevant digital solution for EU companies.



Most relevant		
Area	Digital Solution	
Central and Eastern Europe	Internet of Things (40%)	
Africa	Internet of Things (73%)	
Middle East	Internet of Things (72%)	
Total EMEA	Internet of Things (49%)	
Industry	Digital Solution	n=2,993
Industry and manufacturing	Robotics (49%)	
Retail	Internet of Things (49%)	
Services	Internet of Things (50%)	
Building and Construction	Internet of Things (41%)	
Transportation	Internet of Things (45%)	
Energy	Internet of Things (55%)	
Financial services	Internet of Things (51%)	
Real estate	Internet of Things (47%)	
Healthcare and pharma	Robotics (49%)	

Relevance of Essential Eight technologies by country (1/3)

Artificial Intelligence

EU31	23%	
Romania	42%	
Portugal	42%	
United Kingdom	40%	
Malta	37%	
Spain	34%	
Norway	34%	
Denmark	34%	
Italy	33%	
Ireland	32%	
Sweden	30%	
Netherlands	27%	
Cyprus	27%	
Belgium	24%	
Bulgaria	24%	
Greece	23%	
Baltics	23%	
France	23%	
Finland	22%	
Turkey	21%	
Hungary	14%	
Slovenia	13%	
Luxembourg	13%	
Germany	13%	
Slovakia	13%	
Poland	11%	
Croatia	10%	
Czech Republic	8%	
Austria	6%	n=569
Switzerland	4%	=000

Internet of Things

EU31	46%	
Bulgaria	76%	
Portugal	73%	
United Kingdom	73%	
Spain	63%	
Ireland	62%	
Malta	60%	
Belgium	57%	
Italy	54%	1
Cyprus	53%	
Netherlands	53%	
Romania	52%	
Norway	52%	
Denmark	52%	
Croatia	50%	
Greece	48%	
Finland	46%	
Sweden	44%	
Baltics	43%	
Slovakia	40%	
Switzerland	39%	
Turkey	34%	
Germany	34%	
Hungary	32%	
France	28%	
Slovenia	23%	
Czech Republic	22%	
Austria	21%	
Luxembourg	20%	
Poland	19%	n=1115
Fulariu	1370	

Robotics

EU31	33%
Romania	52%
Denmark	48%
Spain	46%
Norway	44%
Belgium	43%
Poland	43%
Netherlands	42%
Czech Republic	42%
Baltics	42%
Portugal	42%
Greece	42%
Turkey	41%
Slovakia	40%
Italy	38%
Austria	37%
Switzerland	32%
Croatia	30%
Sweden	30%
Malta	30%
France	28%
Germany	27%
Slovenia	27%
Hungary	26%
United Kingdom	23%
Bulgaria	22%
Ireland	20%
Luxembourg	13%
Cyprus	13%
Finland	8%

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n=814

Relevance of Essential Eight technologies by country (2/3)

Drones	
EU31	9%
Belgium	26%
Romania	24%
Portugal	23%
Denmark	22%
Ireland	20%
Spain	14%
France	12%
Norway	12%
Czech Republic	12%
Sweden	10%
Baltics	10%
Greece	8%
Turkey	8%
Italy	7%
Malta	7%
Croatia	7%
United Kingdom	6%
Germany	6%
Netherlands	6%
Switzerland	6%
Hungary	4%
Finland	4%
Bulgaria	4%
Slovenia	3%
Poland	3%
Austria	3%
Slovakia	3%
Luxembourg	
Cyprus	

Augmented Reality

n=221

16%	
26%	
24%	
23%	
21%	
20%	
20%	
20%	
20%	
20%	
19%	
18%	
18%	
15%	
14%	
14%	
13%	
12%	
10%	
8%	
6%	
6%	
3%	
3%	
2%	
2%	n=395
	000
	34% 31% 26% 26% 24% 23% 21% 20% 20% 20% 20% 18% 18% 14% 14% 12% 6% 6% 6% 3% 3% 2%

Blockchain

EU31	15%
Portugal	27%
United Kingdom	25%
Italy	23%
Romania	22%
Malta	20%
Greece	20%
France	20%
Denmark	20%
Cyprus	20%
Spain	19%
Germany	17%
Netherlands	16%
Turkey	12%
Slovakia	10%
Norway	10%
Luxembourg	10%
Ireland	10%
Poland	9%
Belgium	9%
Sweden	8%
Switzerland	8%
Slovenia	7%
Hungary	6%
Baltics	5%
Austria	4%
Bulgaria	4%
Croatia	3%
Czech Republic	2%
Finland	

n=364

Relevance of Essential Eight technologies by country (3/3)

Virtual Reality

EU31	20%	
United Kingdom	35%	
Romania	34%	
Netherlands	31%	
Spain	30%	
Belgium	30%	
Norway	28%	
Denmark	26%	
Turkey	25%	
Portugal	25%	
Ireland	22%	
Sweden	20%	
Bulgaria	20%	
Switzerland	19%	
Finland	18%	
Baltics	17%	
Croatia	17%	
Germany	16%	
France	16%	
Greece	15%	
Luxembourg	13%	
Poland	13%	
Slovakia	13%	
Austria	11%	
Cyprus	10%	
Italy	9%	
Hungary	8%	
Malta	7%	
Czech Republic	4%	- 101
Slovenia	3%	n=481
2.370mg		

3D printing

ob printing		
EU31	21%	
United Kingdom	39%	
Turkey	37%	
Romania	32%	
Portugal	32%	
Spain	28%	
Norway	28%	-
France	27%	i i
Belgium	26%	
Slovakia	25%	
Italy	21%	
Sweden	20%	
Netherlands	20%	
Ireland	20%	
Czech Republic	20%	
Switzerland	18%	
Hungary	16%	
Denmark	16% 15%	
Germany Austria	15%	
Finland	14%	
Poland	14 //	
Malta	13%	
Greece	13%	
Cyprus	13%	
Croatia	10%	
Bulgaria	8%	
Baltics	6%	
Slovenia	3%	n=517
Luxembourg	3%	11-517

Top 5 countries using Essential Eight technologies

Artificial Intelligen	nce	Augmented Reali	ty	Blockchain		Drones	
Country	Usage in %	Country	Usage in %	Country	Usage in %	Country	Usage in %
United Kingdom	45%	United Kingdom	33%	Portugal	32%	Denmark	20%
Norway	38%	Spain	31%	Cyprus	30%	Portugal	20%
Spain	35%	Portugal	30%	United Kingdom	28%	Belgium	18%
Italy	35%	Sweden	30%	Greece	27%	Norway	16%
Portugal	33%	Norway	26%	France	26%	Turkey	16%
Internet of Things		Robotics		Virtual Reality		3-D-Printing	
Country	Usage in %	Country	Usage in %	Country	Usage in %	Country	Usage in %
United Kingdom	81%	Denmark	50%	United Kingdom	40%	United Kingdom	45%
Portugal	80%	Romania	48%	Norway	38%	Turkey	45%
Bulgaria	76%	Turkey	46%	Spain	32%	Spain	32%

45%

43%

Netherlands

Portugal

31%

30%

Portugal

France

*Countries making use of Essential Eight technologies relative to sample size

70%

68%

Portugal

Spain

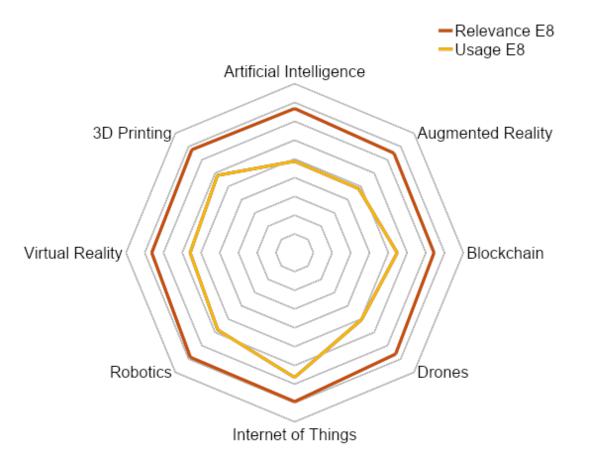
Malta

Spain

32%

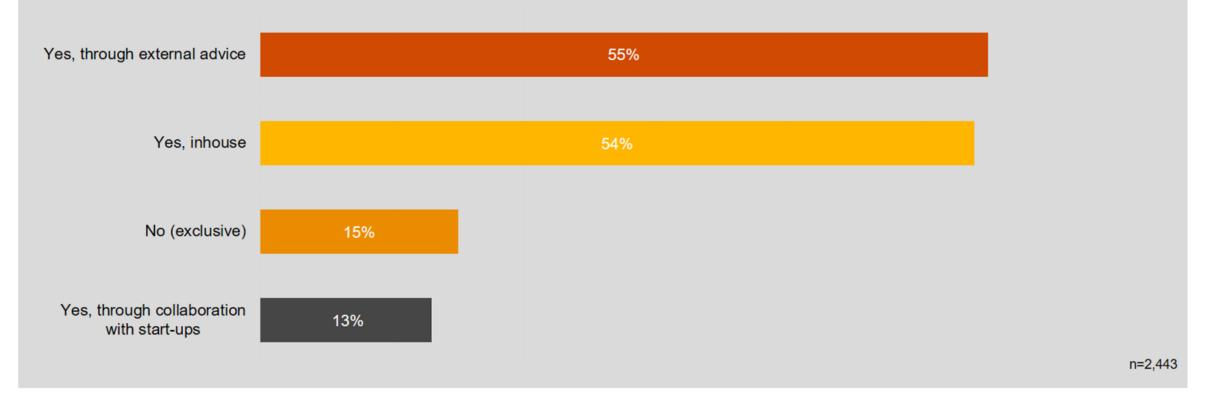
29%

Usage and Relevance of Essential Eight



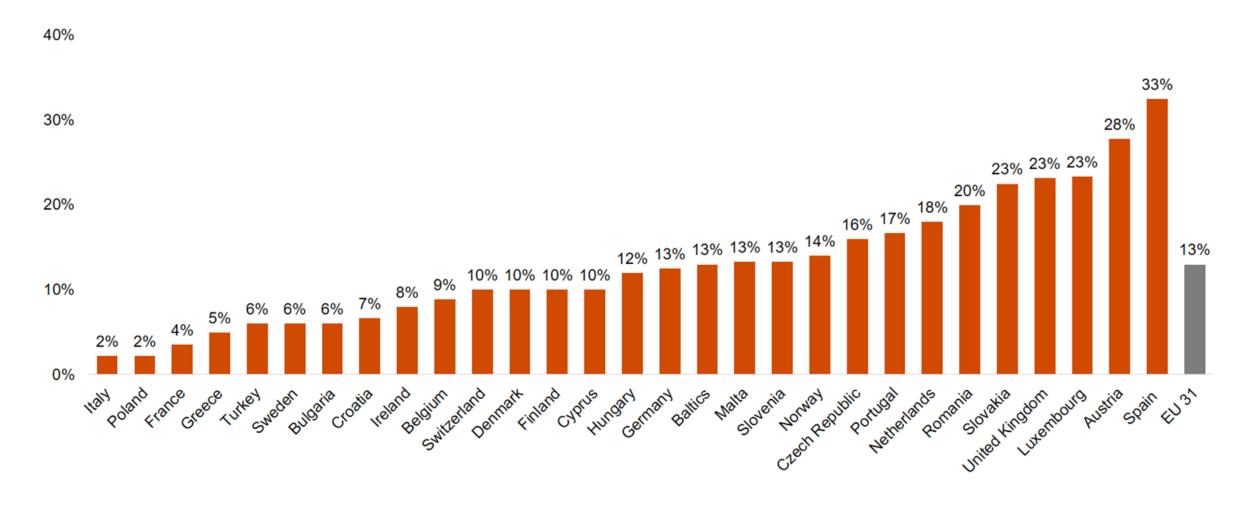
Access to the right talents More than half of the entrepreneurs in the EU have the right access to digital talents inhouse.

Does your company have access to the right talent to realise the full benefits of these digital technologies? (Multiple Answers)



Proportion of collaboration with startups by country

Companies in Spain, Austria and Luxembourg consider collaborations with startups the most.



Measures to get access to skills

The most important measure for companies in Europe is targeted knowledge enhancement through internal training.

How important are each of the following measures for your company to build up or get access to skills to advance digitalisation/implement and apply digital technologies? (Multiple Answers)



Proportion of "upskilling of workforce through collaboration with startups"

Area	Percentage	
Central and Eastern Europe	26.3	
Africa	47.5	
Middle East	59.0	
Total EMEA	32.4	

Industry	Percentage	n=2,993
Industry and manufacturing	28.2	
Retail	31.7	
Services	28.1	
Building and Construction	33.6	
Transportation	27.9	
Energy	28.1	
Financial services	38.5	
Real estate	35.3	
Healthcare and pharma	40.0	

Measures to get access to skills by country (1/3)Spanish, Portuguese and British companies collaborate with startups to upskill their workforce.

Recruiting of national graduates

EU 31	45%	
Slovenia		77%
Cyprus		67%
Spain		67%
Portugal		63%
Malta	6	0%
Greece	58	3%
Baltics	57	%
Turkey	56%	%
Romania	56%	%
Netherlands	55%	6
Switzerland	54%	5
Italy	54%	
Belgium	52%	
Sweden	48%	
Denmark	46%	
Slovakia	45%	
France	44%	
United Kingdom	43%	
Luxembourg	40%	
Croatia	40%	
Austria	39%	
Norway	38%	
Poland	37%	
Bulgaria	36%	
Germany	33%	
Czech Republic	30%	
Hungary	22%	
Ireland	4%	
Finland	2%	n=1083

Recruiting of international graduates

EU 31	22%	
Cyprus	60%	
Greece	45%	
Luxembourg	43%	
Spain	37%	
Świtzerland	33%	
Malta	33%	
Italy	31%	
Slovenia	30%	
Portugal	30%	
United Kingdom	28%	
France	26%	
Turkey	25%	
Baltics	25%	
Sweden	24%	
Romania	20%	
Denmark	20%	
Austria	20%	
Norway	18%	
Netherlands	16%	
Germany	14%	
Belgium	13%	
Slovakia	13%	
Czech Republic	8%	
Poland	8%	
Hungary	4%	
Bulgaria	4%	
Croatia	3%	
Ireland	2%	
Finland	🥦 N:	=53

EU 31	29%	
United Kingdom 🖡	55%	
Spain	54%	
Greece	48%	
Portugal	43%	
Romania	42%	
Italy	41%	
Croatia	40%	
Malta I	40%	
Bulgaria	38%	
Turkey	34%	
Belgium	30%	
Baltics	30%	
France	29%	
Switzerland	28%	
Slovakia	28%	
Austria	27%	
Cyprus	27%	
Netherlands	26%	
Poland	26%	
Denmark	24%	
Luxembourg	20%	
Sweden	16%	
CzechRepublic 🖡	16%	
Slovenia	13%	
Germany	12%	
Norway	12%	
Hungary	10%	

Measures to get access to skills by country (2/3)

Targeted knowledge enhancement through internal trainings is highest in Switzerland while Cyprus frequently rely on staff leasing.

	wledge enhancement through
internal trainir	ngs
EU 31	65%
Malta	90%
United Kingdom	86%
Switzerland	82%
Netherlands	81%
Slovenia	80%
Italy	78%
Norway	78%
Croatia	77%
Spain	76%
Baltics	73%
Romania	72%
Portugal	72%
Denmark	68%
Bulgaria	68%
Greece	65%
Turkey	64%
Germany	64%
Cyprus	63%
Slovakia	60%
Austria	56%
Hungary	52%
Sweden	50%
Czech Republic	50%
Poland	49%
France	44%
Belgium	43%
Luxembourg	37%
Finland	24%
Ireland	16%
	n=1584

Use of extern	nal trainings	
EU 31	54%	
Malta	80%	
United Kingdom	77%	
Netherlands	75%	
Portugal	72%	
Switzerland	70%	
Spain	70%	
Italy	67%	
Slovenia	67%	
Romania	64%	
Baltics	62%	
Czech Republic	60%	
Bulgaria	60%	
Turkey	58%	
Denmark	58%	
Norway	56%	
Poland	50%	
Croatia	50%	
Sweden	48%	
Slovakia	48%	
Hungary	46%	
Germany	46%	
Greece	43%	
France	43%	
Austria	42%	
Luxembourg	37%	
Cyprus	33%	
Belgium	29%	
Finland	8%	
Ireland	m=13	23

Staff leasing

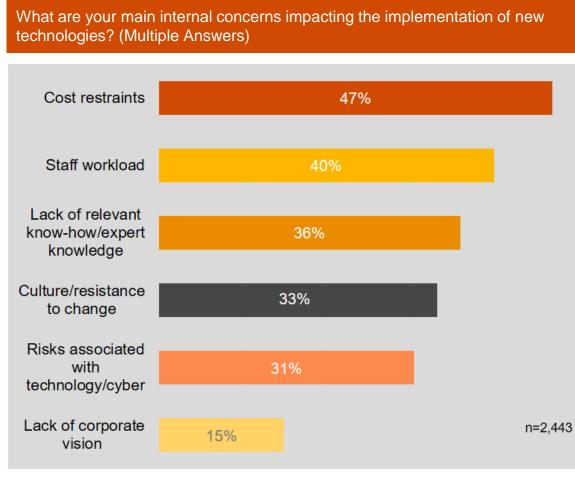
EU 31	17%	
Netherlands	37%	
Cyprus	37%	
United Kingdom	34%	
France	26%	
Spain	24%	
Portugal	23%	
Romania	22%	
Greece	18%	
Switzerland	17%	
Italy	17%	
Croatia	17%	
Sweden	16%	
Turkey	15%	
Baltics	15%	
Norway	14%	
Slovenia	13%	
Malta	13%	
Germany	13%	
Austria	12%	
Bulgaria	12%	
Poland	11%	
Belgium	10%	
Slovakia	8%	
Hungary	6%	
Czech Republic	6%	
Denmark	4%	
Luxembourg	3%	
Finland	2%	
Ireland		n=431

Measures to get access to skills by country (2/3)Targeted recruiting of skilled experts is especially high in Switzerland and Norway.

Targeted recruiting of skilled experts			
EU 31	58%		
Switzerland	79%		
United Kingdom	76%		
Netherlands	74%		
Norway	72%		
Italy	72%		
Turkey	69%		
Hungary	66%		
Portugal	63%		
Malta	63%		
Baltics	63%		
Germany	58%		
Romania	56%		
Spain	55%		
Austria	54%		
Ireland	54%		
Croatia	53%		
Slovakia	53%		
Belgium	52%		
Finland	52%		
Denmark	52%		
Sweden	50%		
Poland	44%		
Cyprus	43%		
Bulgaria	40%		
Luxembourg	40%		
France	39%		
Czech Republic	36%		
Greece	33%		
Slovenia	30% n=1427		

Internal concerns

The biggest internal concern of companies in EU impacting the implementation of new technologies are cost restraints.



Most relevant		
Area	Measure	
Central and Eastern Europe	Cost restraints (51%)	
Africa	Culture/resistance to cha	ange (43%)
Middle East	Cost restraints (42%)	
Total EMEA	Cost restraints (46%)	
Industry	Measure	n=2.993
Industry and manufacturing	Cost restraints (47%)	
Retail	Cost restraints (54%)	
Services	Cost restraints (49%)	
Building and Construction	Cost restraints (43%)	
Transportation	Cost restraints (44%)	
Energy	Cost restraints (34%)	
Financial services	Risks associated with technology/cyber (51%)	
Real estate	Risks associated with technology/cyber (65%)	
Healthcare and pharma	Cost restraints (54%)	

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Internal concerns by country (1/2)

Staff workload is one of the biggest internal concerns for companies in Malta, Slovakia, Portugal and the Czech Republic.

Lack of corporate vision

EU 31	15%	
Malta	40%	
Spain	39%	
Portugal	27%	
Slovakia	25%	
Czech Republic	22%	
Turkey	19%	
Netherlands	19%	
Belgium	19%	
France	18%	
Baltics	17%	
Poland	17%	
Italy	16%	
Romania	16%	
Denmark	16%	
Hungary	14%	
United Kingdom	14%	
Croatia	13%	
Cyprus	13%	
Switzerland	12%	
Bulgaria	12%	
Slovenia	10%	
Norway	8%	
Germany	8%	
Greece	7%	
Austria	4%	
Finland	4%	
Luxembourg	3%	
Ireland	2%	
Sweden	2%	
	n=359	

Culture/resistance to change

EU 31	33%		
Malta	70%		
Portugal	67%		
Norway	56%		
Netherlands	56%		
Denmark	56%		
Spain	53%		
Italy	45%		
Romania	44%		
Slovenia	40%		
Baltics	38%		
Slovakia	38%		
Czech Republic	34%		
Sweden	34%		
Croatia	33%		
United Kingdom	33%		
Hungary	32%		
Poland	31%		
Cyprus	30%		
Belgium	28%		
Bulgaria	26%		
Finland	26%		
Germany	25%		
Austria	24%		
Greece	22%		
Turkey	20%		
Switzerland	20%		
Ireland	16%		
France	15%		
Luxembourg	13%		
5		n=818	

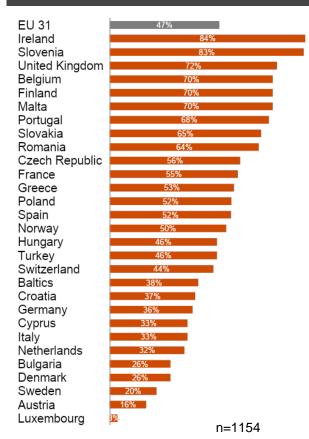
Staff workload

EU 31 Malta Slovakia Portugal Czech Republic Spain Netherlands Switzerland United Kingdom Norway Sweden Bulgaria Slovenia Hungary Denmark Baltics Croatia Romania Belgium Poland	40% 80% 65% 65% 64% 60% 59% 53% 50% 50% 50% 46% 44% 43% 43% 42% 40% 37% 37% 36%	
	33%	
Cyprus	33%	
Germany Italy	33% 31%	
Greece	30%	
France	26%	
Turkey	24%	
Ireland	22%	
Austria	21%	
Luxembourg	17%	
Finland	16%	
	-	n=967

Internal concerns by country (2/2)

Companies in Ireland, Slovenia, and the United Kingdom are mostly concerned about cost restraints.

Cost restraints



Lack of relevant know-how/expert knowledge

EU 31	36%	
Czech Republic	64%	
United Kingdom	53%	
Norway	52%	
Slovakia	50%	
Romania	50%	
Malta	50%	
Spain	50%	-
Portugal	48%	
Belgium	46%	
Switzerland	42%	
Ireland	42%	
Denmark	40%	
Finland	38%	
Germany	38%	
Turkey	36%	
Bulgaria	34%	
Slovenia	33%	
Baltics	33%	
Netherlands	33%	
Sweden	32%	
Hungary	30%	
Croatia	30%	
Poland	28%	
Cyprus	23%	
Italy	20%	
Austria	20%	
France	15%	
Greece	7%	
Luxembourg		n_000
-	-	n=880

Risks associated with technology/cyber

EU 31	31%	
Malta	57%	
Slovakia	55%	
Romania	55%	
	54 % 52%	
Czech Republic	47%	•
Portugal	47%	
Germany	42%	
Spain	42% 41%	
United Kingdom	41%	
Luxembourg Austria	39%	
Switzerland	35%	
Slovenia	34%	
Bulgaria	30%	
Norway	30%	
Netherlands	28%	
Poland	24%	
Sweden	24%	
Cyprus	23%	
Denmark	22%	
Turkey	20%	
Hungary	18%	
Belgium	17%	
Baltics	15%	
France	14%	
Croatia	13%	
Ireland	12%	
Greece	12%	
Italy	12%	
Finland	6%	
		n=75

European Private Business Survey PwC n=751

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